A Fenman publication

August 1999

TRAINING JOURNAL

The Independent Journal for Professional Trainers

Service level agreements

Accelerated learning

Training needs analysis

Creative customer contact

Managing organisational change

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Catch the wave

Marketing on the Internet

a new course from Spearhead Training

Profit from this new media

About the Programme

This programme is for Executives who think that the Internet may become part of their promotional mix. Hailed as the great new media, Internet hype has run ahead of reality. However, the potential is there for seriously beneficial marketing activities. Marketers simply cannot ignore the many very large international enterprises that are actively supporting web growth. They may ignore at their peril, the even larger number of enterprises from every sector of business who have a presence and are testing many innovative ideas.

Course Objectives

To brief delegates on current Web progress (using many case studies).
To demonstrate good use of the medium. To provide a forum to discuss technical queries about Web Site Management.
To stimulate ideas within the group which will help with individual organisations' marketing (communication) decisions.

What You Will Gain

Ignoring the web means that many are running the danger of being outflanked by more web aware competitors. This programme is an opportunity to keep up with what is going on and consider opportunities for one's own organisation. Small numbers on Spearhead courses means that there will be time to deal with individual delegate issues. Attending this programme will save months of individual research.

Programme Timings
1 Day Non-Residential
Start 09.45 Finish 17.00

1999 Venue, Dates & Course Fee

LONDON, Business Design Centre - Islington
16 August, 22 September, 25 October, 17 December
£375 + VAT

Programme Content

The Internet
- ✓ Why All the Interest?

Internet Tools and Services
- ✓ Communications
- ✓ Information Vending
- ✓ E-Mail and Intranets
- ✓ The World Wide Web (www)

Marketing on the Internet
- ✓ A Different Approach
- ✓ Web Principles
- ✓ Campaign Integration

Marketing Strategy
- ✓ Why Have a Web Site and is it Justified for Your Organisation?

Monitoring Results and Improving Your Strategy

Key Marketing Activities
- ✓ Market Research
- ✓ Direct Marketing on the Internet
- ✓ Selling and Order Taking
- ✓ E-Commerce and Online Payment

An Effective Web Presence
- ✓ What Makes a well marketed Web Site?
- ✓ Types of Web Site
- ✓ Web site Do's and Don'ts
- ✓ Establishing a Web Presence
- ✓ Stages of the Process

The Future
- ✓ New Techniques
- ✓ Convergence
- ✓ The Nature of E-Business in the Future

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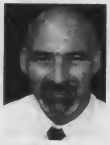

Martin Delahoussaye
is the publisher and managing editor of *Training Journal*

The way we were

Almost every survey I read on future trends in training predicts an unprecedented growth in technology-based training. This is not entirely surprising when the rewards are as attractive as tailored and individualised instruction, reduced training costs and greater learning efficiency. These are admirable benefits but we could pay a heavy price to achieve them.

The world is moving at a phenomenal pace and it is easy to lose sight of basic human needs in the wash of technical advance. Nearly 40 years ago, the urban planners lost sight of our basic human needs and the consequences were disastrous. The 60s solution to the chronic housing shortage was the tower block. The solution delivered accessible and affordable housing but created more problems than it solved - lack of social interaction and feelings of isolation among them. The 'solution' helped breed individualism in favour of collectivism. It created ghettos, where menacing and roaming gangs replaced the friendly, social groups of earlier decades. Communal gardens became no-go areas. Twenty years later we learned the lesson, and began to tear down the tower blocks. And what did we build in their place? The very village-type communities that we bulldozed away in the name of progress. How many of today's solutions will we eventually turn the bulldozer on, I wonder?

If we fall into the trap of seeing technology-based training as a panacea we head for problems similar in many ways to those associated with the 60s housing solution. Futurists predict that we'll buy all our books on the Internet, we'll select and watch our movies via cable and satellite, and when we get into our technically advanced and environmentally friendly cars to leave for work, if we are not already working from home, we'll find the solution to all our business problems right there on the desk top via electronic performance support systems and just-in-time training. But is this progress? When we are living our lives in separate bubbles of space, independent and self-sufficient, will we mourn the days when we could sit in a room with real people, share an experience over a cup of coffee, or interact with and learn from others in a training session? Classroom-based, group-based, team-based learning, whatever your preferred choice of label, may be considered too expensive when compared to the lean, mean, fighting machine on your desk. But there are rewards and benefits to this method that cannot be measured in pounds, shillings and pence. If we could put a figure on it, a very different picture would emerge as regards the cost/benefit ratio of traditional training versus the new and emerging technology-based training.

This is not Luddite thinking. I acknowledge the Internet, and its variant technologies, as one of the greatest inventions of the modern era. The way we can now access and share information is nothing short of miraculous. It has made teleworking and virtual teams possible and offers many people the potential to live in peaceful surroundings far removed from the congested cities and business districts into which they have struggled every day for years. There is no doubt that technology will also resolve some of the problems trainers have wrestled with for years. But before we rush to relegate the whiteboard, flipchart, overhead projector and the desks and tables to the corporate scrap heap, we should take a backward look - history can tell us much about the future. So, if we think integration and not substitution, we can enjoy the benefits of both the 'old' way and the new and emerging technologies.

Sincerely

Martin Delahoussaye
Publisher

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News

Recent events, surveys and trends and **up-to-date news** on the government's training initiatives and workplace reforms.

SURVEY

DDI publishes 1999 Human Resources Directory

DDI has released the National Human Resources Directors Survey for 1999. The survey, prepared in conjunction with the Institute of Directors, is a status report on the views and outlook of the UK's most senior practitioners of HR. Key findings of the report include the following: The most critical people issues are 'hiring the right people' and 'retaining and motivating employees'. HR directors place culture fit between the organisation's culture and individual motivation, and management effectiveness as the two most effective methods for retaining employees in the longer term.

HR directors are also largely dissatisfied with the quality of their employees. According to the survey, less than 14 per cent of said they would re-hire 81-100 per cent of their workforce while another 14per cent would re-hire as few as 0-20 per cent.

The two key qualities of tomorrow's leaders will be inspiring others and coping with change. HR directors rate communication, coaching and developing others as important qualities ahead of technical or professional knowledge.

For further information or to order a copy of the report contact Jean-Michel Beeching at (tel) 01628 642718 or (email) jean-michel.beeching@ddi-europe.com

GOVERNMENT

Prime Minister welcomes first year success for new deal

Prime Minister Tony Blair announced that the New Deal has found work for 100,000 young unemployed people since its launch last April putting it on track to meet the government's pledge to get 250,000 from welfare in to work. In addition, 50,000 employers have signed up to the New Deal.

Mr Blair, Mr Blunkett and Employment Minister Andrew Smith were addressing the New Deal Conference at the International Conference Centre in Birmingham.

The conference is designed to recognise the outstanding contributions made by people involved in the New Deal across the country, and to review progress and areas for improvement.

The Prime Minister said: "In return for accepting responsibility for their own futures, young people should have intensive support and encouragement in finding work and upgrading their skills.

The New Deal is providing meaningful help, and it is having a major impact in getting people off benefit and into work.

HEALTH & SAFETY

Making business a pleasure

Everyone from the boardroom to the shop floor knows what to do to keep healthy for business and pleasure: quit smoking, cut down the alcohol, eat less fat and work out.

Yet while this advice is true, although sometimes difficult to follow, there's another step we can all take to give a big boost to health and energy: make an effort to take control at work.

More and more research, highlighted by the Health Education Authority (HEA) to promote World Mental Health Day (10 October 1999), shows the link between a lack of control at work and poor physical health.

Studies have shown that lack of control over your job can cause stress and depression, and an increased risk of heart disease. It can also lead to unhealthy behaviour, like heavy drinking, as a way of coping – which in turn increases the risk of heart attack.

A number of other physical symptoms are also related to stress, including headaches, stomach upsets and a weakened immune system, which may lead to greater chance of catching a cold or other infection.

There are a number of steps that individual employees and employers can take to reduce the risk of ill health as a result of the workplace. The HEA has produced a factsheet, 'Mental health promotion and people at work', giving guidance and sources of further support on mental health issues, including bullying, stress and depression.

• SURVEY

Britain's workforce is smelly, rude and noisy

Britain's workplace is made up of smelly, rude people who make too much noise and are driving their colleagues to distraction, according to a new report.

The survey, conducted by NOP on behalf of Internet management company intY, asked workers about their top office irritants. And the results don't paint a pretty picture of the average office.

Over half of those questioned claimed that their colleagues are rude, with 51 per cent complaining about co-workers' noise. While everyone is enjoying the summer heat-wave, it looks set to bring out the worst in the office environment – 43 per cent of workers claim that their colleagues suffer from BO.

Dishwater tea and coffee are also high on the list with nearly a quarter of respondents complaining about unsatisfactory beverages in the office. And when it comes to eating in the workplace, one in ten has a big problem with the sight and sound of colleagues munching away.

Too many meetings are predictably a major bugbear. Nearly half of those questioned would prefer to spend less time discussing work and more time getting on with it.

Top Ten office irritants

1. Lack of support (56 per cent)
2. Rude colleagues (55 per cent)
3. Noisy colleagues (51 per cent)
4. Work being behind the times (49 per cent)
5. Having too much work (46 per cent)
6. Too many meetings (44 per cent)
7. Smelly colleagues (43 per cent)
8. Technology failure (39 per cent)
9. Hot desking (27 per cent)
10. Bad tea and coffee (22 per cent)

The NOP survey was conducted in April 1999, among office workers representing small, medium and large sized companies.

For further information contact Sue Bischoff or Leah May, Band & Brown PR at (tel) 0117 927 2444 or (email) leah@bbpr.com

• HOSPITALITY

English tourism council launched to help industry deliver world class tourism

A new lead body for England's tourism, the English Tourism Council, was formally launched in July by the Secretary of State for Culture, Media and Sport, the Rt Hon Chris Smith, MP. The launch is the result of a radical review of funding and support for tourism that began in July 1998 with the Department of Culture, Media and Sport's (DCMS) overall Comprehensive Spending Review.

The new English Tourism Council (ETC) is charged with leading the industry into the next century, and providing a vital role in creating world class tourism in England.

The three main aims of the ETC are as follows:

1. To improve the quality of England's tourism experience so that expectations of overseas and domestic visitors are met and exceeded.
2. To strengthen the competitiveness of the industry in England.
3. To encourage the wise growth of tourism so that its assets are protected for the future.

The ETC, which has radically transformed itself out of the ETB, will now be passing many of the ETB's traditional roles to the regions. These include the management of the Welcome Family of training programmes and support for the Tourist Information Centres.

For further information contact Robyn Griffith-Jones at (tel) 0181 563 3322 or Paul Duboudin at (tel) 0181 563 3037, ETC press office.

• FREE OFFER

Fenman offers FREE activity

Fenman, the leading publisher of print-based training resources, has announced that it is giving away a FREE activity to the first 50 trainers to visit its website and request a copy of the their new activity pack, *Setting Objectives and Seeing Them Through*.

Visitors to the Fenman site, www.fenman.co.uk are encouraged to request a free ten-day assessment of the new pack which covers every aspect of objective setting, from understanding what objectives are – and why they should be 'SMART' – through to developing objectives for teams and departments, as well as individuals.

The FREE activity, which is not part of the main pack, is a role-play giving participants practice in agreeing SMART objectives in a range of circumstances. The activity is a FREE gift and can be kept regardless of whether a decision to purchase the pack is made or not.

For details of the offer, visit www.fenman.co.uk and click on 'NEW'.

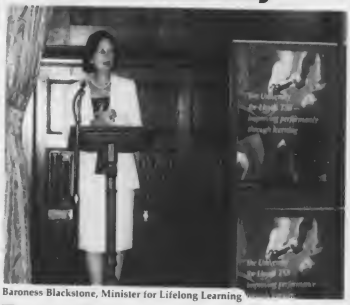
• RESEARCH

Major research programme on training and learning

The Economic and Social Research Council (ESRC) has mounted a major programme of research into teaching/training and learning. The prime objective is to improve outcomes for learners at all ages across a wide range of educational and training contexts, from pre-school education through to the many forms of professional, industrial and commercial training. The programme is large scale and designed to achieve long-term benefits, not least of which will be an increase in the capacity of practitioners to promote further improvements in learning through the conduct of research. The consultation exercise aims to promote discussion around the country with those involved in training and learning, and involves a variety of activities.

One of these is a website questionnaire that enables anyone to voice an opinion and contribute to this process. The questionnaire, along with more information on the research programme, can be found on the ESRC website at www.ex.ac.uk/ESRC-TLRP

Lloyds TSB launches corporate university



Baroness Blackstone, Minister for Lifelong Learning

Lloyds TSB has launched what is likely to be the largest corporate 'university' in Europe – the University for Lloyds TSB.

All 77,000 employees of Lloyds TSB will be able to benefit from a comprehensive learning network through a variety of channels. The primary aim of the University is to make training more accessible to staff. The training will reflect the requirements for employees, particularly tailored to the needs of those working for Lloyds TSB.

The University for Lloyds TSB will consist of:

- central and regional training centres providing residential training in a wide variety of subjects.
- a flexible learning library delivering distance learning materials to local offices.
- a network of training and development centres equipped with the latest technology and providing a wide range of training materials.
- local on-line training delivered through multi-media PC workstations. Use of the Internet will allow home-based learning.

The University for Lloyds TSB will allow employees to achieve recognition for their learning internally and externally against nationally recognised qualifications such as NVQs and eventually to use these as access qualifications to external degree and MBA courses.

The launch was held at the House of Commons and attended by Baroness Blackstone, Minister for Lifelong Learning, Lord Dearing, Chairman of the University for Industry and Norman Mitchinson, Lloyds TSB's director of Group Human Resources.

Mitchinson said: 'The launch of the University for Lloyds TSB will enable us to provide training for employees in the areas that will benefit them most. It will put Lloyds TSB at the forefront of career-long learning in support of government policy, and provide a centre of excellence in career advice.'

For further information contact Eric Linin, Senior Manager, Training and Development, Lloyds TSB at (tel) 0171 661 3660

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PROVEN TO WORK

• GOVERNMENT

Blunkett to transform post-sixteen learning

Education and Employment Secretary David Blunkett announced proposals for a new Learning and Skills Council to spearhead high standards and boost value for money in post 16 learning.

The Council will have a budget of around £5 billion to provide education and training for more than five million students over the age of 16.

The White Paper, Learning to Succeed, sets out proposals for:

- a national Learning and Skills Council to provide coherence and reduce bureaucracy, with 4050 local Learning and Skills Councils to develop local plans;
- a strengthened strategic role for business in education and training influencing a £5 billion budget, compared to the current £1 billion spent by Training and Enterprise Councils
- employers to have the largest input into the Learning and Skills Councils
- a radical new youth programme, Connexions, including a new youth support service modernising the Careers Service and improving links with the Youth Service, with dedicated personal advisors for young people
- greater co-operation between sixth forms and colleges, while preserving real-term funding for popular sixth forms
- establishing an independent, effective inspectorate covering all work-related learning and training, and a new role for Ofsted in taking responsibility for inspection of provision for 16-19 year olds in schools and colleges with both inspectorates working together on the inspection of colleges for this age group
- transferring responsibility for work-based learning for unemployed adults to the employment service to provide the same seamless approach developed in the New Deal for under 25s
- delivering substantial savings of at least £50 million by cutting wasteful bureaucracy and streamlining programme delivery.

Announcing the proposals, Mr Blunkett said: 'It is clear that a highly skilled workforce is essential for prosperity and social cohesion in the next century. The existing post-16 system is inadequate for the purpose; staying on rates remain too low; and standards are too variable, and unacceptably low in many areas. There is too little clarity, co-ordination and coherence between further education and training. There is too much duplication and there are too many layers in contracting and funding.

The proposals I am announcing today will support the tripartite responsibility of employers, learners and government. We need to ensure high standards in further education and training; effective planning and funding; and the delivery of National Targets.

• WORKPLACE LEARNING

UK workplaces still failing the learning test

A new report, 'Workplace Learning, Culture and Performance', published by the Institute of Personnel and Development (IPD) in collaboration with the International Federation of Training and Development Organisations (IFTDO), shows that the UK has been slow in embracing high performance working practices and the high performance learning on which these are based. Such practices include a mixture of learning through experience, improving the design of work systems, employee development and flexible learning. However, far too many UK businesses are still stuck in a low skill, low quality equilibrium and are a long way from becoming high performance workplaces.

The report sets out a comprehensive view of the changes in market conditions that are providing the spur to increased investment in human capital. The two main drivers are globalisation and the introduction of new technologies. While there is no one country that can be used as a model for turning UK plc from a low performance to a high performance economy, lessons can be learned from aboard.

The report highlights the close links that Germany has developed between education and employment – links that will provide the foundations for Germany's future recovery. Singapore and Canada are also cited as countries from which the UK has much to learn. They have succeeded in developing and encouraging cultures that have moved away from a narrowly focused pedagogic educational approach and towards a continuous learning approach which focuses as much on 'soft' skills as on hard qualifications. The report contends that it is the development of core skills, communication, teamwork and leadership, that will provide the foundations for future competitive success.

'Workplace Learning, Culture and Performance' can be ordered direct from business bookshops or Plymbridge Distributions Ltd at (tel) 01752 202301

• TRAINING

Virtual learning a reality

Performance management specialists, The McMillan Partnership, has made the virtual learning centre a reality with the launch of a new national network of training resource specialists. The network will provide independent advice for organisations across the UK on training, development and their associated resources.

The resource network is able to offer organisations a selection of thousands of training tools, available via the McMillan Partnership's interactive Web site, Learning Works. Learning Works provides information on the latest of learning resources available in subjects ranging from accounting and book keeping to time management and writing skills. This resource information will be offered to customers in conjunction with advice on the most suitable level of expertise and training medium (ranging from books and audio tapes to videos, Computer-Based Training and other associated tools). The network will also act as local preview centres where training resources can be evaluated before purchase.

The McMillan Partnership network will also be able to provide practical help on implementing training courses and will offer the services of local trainers, so organisations can plan their training and development requirements according to need.

"The idea of the virtual learning centre can now become a reality," explained Scott Chambers, managing director of the McMillan Partnership. "Organisations now have a new option – rather than building an expensive resource centre, full of materials that do not get used to their maximum, they can purchase training tools as and when they require them and get useful advice and guidance on how staff can be developed in the most effective way," he continued.

Further information from the McMillan Partnership at (tel) 0118 988 6022 or (fax) 0118 988 6374

HR and training professionals in service industries face challenge to improve customer service

Historic buildings, museums and the London Police provide the best customer service in the Capital, according to a new survey*, 'The London Customer Service Monitor', by Managing the Service Business (MSB). 86 per cent of survey respondents – who included foreign and UK-based business and leisure visitors as well as London residents and workers – rated historic buildings highly (a score of at least eight, nine or ten on a ten-point scale) when it comes to customer service.

Museums and the London Police were rated very well by 82 per cent and 78 per cent of respondents respectively. London cabs and pubs also scored highly, with almost three-quarters of respondents giving them a rating of at least eight out of ten, bringing some substance to the perception of the cheerful London cabby and landlord!

Letting the side down, however, were the tube, train and bus services, which fell behind the rest for their overall service levels. Some 50 per cent of respondents rated the tube in the top three boxes for service and only 45 per cent gave the bus and train services a rating of eight out of ten or over. Opinion was divided on hotels and depended very much on their star rating. Some 88 per cent of respondents rated five-star hotels in the top three boxes, while only 25 per cent of respondents could say the same for hotels with rating of less than three stars.

Don Porter, joint managing director at MSB, commented: 'The first wave of results from the London Service Monitor indicates a good service base in London. There is a great deal about which to be proud.

Opinions of the top scorers, especially the London Police, were particularly encouraging. However there is still some way to go in attaining excellent levels of customer service and value for money across the board. Public transport was identified as an area needing improvement and attention to the hotel market below three stars is urgently required'.

***This is the first London Service Monitor to be carried out. For the survey, 1,000 interviews were conducted with overseas and UK visitors to London and those who work in the capital.**

Copies of the report can be purchased from MSB.

For further information, contact Don Porter or Jonathan Max at (tel) 01344 876 300.

Letters

Comments on the Daniel Goleman interview in *Training Journal*, July 1999

I am sure that this will come out sounding negative – perhaps it is (!) – and I am equally sure that Goleman would respond, 'A typical reaction from an interactive skills trainer'. But I wanted to say that I felt the Goleman interview came over to me as his being extremely patronising – not a case of 'These are my ideas; try them', but 'These are my ideas and they wash out everything else'. I got the impression that Martin showed considerable restraint.

The way forward Goleman is apparently suggesting is far from new and I read it as a rehash of approaches that many interactive skills/behavioural skills facilitators have been putting into practice for years. I was involved in such an approach 25 years ago and I know Peter Honey was even before that. The difference, and the problem that most UK facilitators have (and I also know a number of US and Australian facilitators are in the same position) is one not of an 'Emotional Intelligence' approach and acceptance, but the luxury of being able to have a continued, repetitive contact with their behavioural learners. Many are lucky to be allowed (I was fortunate in this respect with a forward-looking and supportive employer) to have a four-day workshop (over five days) and are told, in effect, that they are lucky to have that, never mind have the learners back again and again. So where does Goleman get his evidence 'we haven't been bothering to do it'? Interactive training is no different from most other forms – what trainer wouldn't like to have time and resource for repeated workshops after the learners have tried to practise their learning!

I am also not too sure above this repetitive contact, again and again and again to which he keeps referring – we are not all Pavlovian, salivating dogs nor reactors to ringing bells! If a model can (cf Peter Honey again) and the learners are given time on that event to identify, reflect on, discuss, practise, reflect, have feedback, reflect and modify during a programme of a reasonable length, they will leave the event, hopefully fired to modify their behaviour, and so on. Again hopefully they are returning to a supportive culture and environment, but in the main it is up to them to develop further. Of course, we would love the luxury of the sustained contact, but this is not possible in the majority of training cases (it may be so in education circles).

Sorry, not impressed.

Leslie Rae

Comments on the new full colour format ...

Just a quick note to say congratulations on the latest issue of *Training Journal*. Without a doubt, it is the most impressive copy I have ever seen – the whole look and feel seems to have improved. The content was always good, but the layout and design of this issue are outstanding – as is the overall content.

Hopefully this is just the beginning – the 'first steps' as you put it in your editorial. Long may it continue.

Everyone at IOL Training Resources would like to say 'well done'.

Best wishes

John Heerey
For the IOL Training team

The July *Training Journal* has just dropped on my desk. I wanted to drop you a line and say how impressed I am with the new format, the level, the range, and the look. I think you're well on the way to realising your vision of having this be the premier journal for trainers and developers!

I think the journal has become about ten times more attractive and useful!

Regards

Kim Boncal
Kaizen Training Ltd

Thanks for the recent copy of *Training Journal*. WOW! what a facelift! Congratulations on a great job, it looks fantastic. I loved the interview with Dan Goleman; you could have been interviewing me, my own philosophies right across the page – stunning. I can't wait to get my hands on a copy of his new book.

Carole Williams

Congratulations on the new look of *Training Journal*. It is brilliant! I like the new layout and design but the quality of the contributors has improved. A very timely revamp.

Thank you

Penny Simmonds
Manager, Professional Development
The Library Association

TRAINING JOURNAL

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Peter Honey, BA (Psych), D Litt, Dip Ed, FIMC, FIPD, is a chartered psychologist and management consultant. He can be contacted at (tel) 01628 633946, (fax) 01628 633262, (email) peterhoney@peterhoney.co.uk or visit (website) www.peterhoney.co.uk

It's official: women are better learners than men

Peter Honey has recently conducted a survey into learning skills and practices, and unearthed two things he was not expecting.

Having lately crunched the numbers for 109 men and 137 women for a survey that I made into learning skills and practices, I have discovered two things. The first is that women emerge as far better learners than men. Of course, if you are a woman this will not be a surprise. All the women I have encountered since the results were published have, without exception, told me that I didn't need to conduct any research to find that out!

Second (and for obvious reasons this finding is more heartening for me), comparing the results for 105 people in their 20s and 30s with those for 141 people in their 40s and 50s shows conclusively that older people are better learners than younger people. This even applies to older men! Needless to say, older women are even better at it.

These results (published in full on my website) provoked a fair bit of media interest and everyone who interviewed me asked why I thought the results had turned out this way. I offered some tentative theories – most invented on the spot so as not to appear totally inept. Even as I obliged with my off-the-cuff explanations, an inner voice reminded me that a conclusion is the place where you get tired of thinking. The same voice also reminded me of a formative experience of nearly 40 years ago when I was an undergraduate struggling to get a degree in psychology.

Even in those days, part of the degree was project-based. My project was undertaken in a small factory that made thermostats. The people who set the bi-metal blades at the 'make and break' temperatures were the highest paid in the factory. They also happened to be women, since part of the folklore in the place maintained that only women had whatever it took to mould the blades between their thumbs and fingers speedily and accurately.

The job was highly sought after but, since the specific skill involved was a mystery, no one knew how to select blade-setters other than by giving them a go at the job for three months. Anyone in the factory could volunteer to have a trial and they spent three months in what was called the schoolroom – except that it had no teachers since the skill was deemed to be un-transmittable; you just had to try it.

If at the end of 12 weeks a person could do it fast enough and to the required standard, they were promoted. If they couldn't, they were rejected and returned to their previous job – everyone knowing they had failed.

Confident of success at establishing the 'mystery' skill, I observed the women who could set thermostats. They went at a terrific rate, moulding each blade until a light went on and off at the required temperatures, while simultaneously chattering away to their neighbours.

I decided that the skill in question was clearly to do with hand/eye co-ordination and proceeded to use a series of appropriate aptitude tests. However, none of these tests distinguished between people who could set thermostats accurately and those who couldn't.

I assumed the skills must be something to do with intelligence and tried some intelligence tests (intelligence is what intelligence tests measure!). But this revealed no difference between the groups. Of course – silly of me not to spot it before – it must be something to do with personality. Perhaps extroverts can do it and introverts can't? Still no difference between the groups.

I ran out of theories and tests, and contemplated defeat. I described my predicament to a friend in a pub one evening and he suggested I tried the dotting test, which entailed giving people a minute to put three dots with a pencil in a series of half-inch squares.

I can tell you in which ways women learn better than men – but don't ask me why

By then anything was worth a try. And the test worked! Women who could set thermostats were significantly better at putting three dots in more squares in 60 seconds than women who couldn't set thermostats. I was jubilant but – and here's the point – to this day I do not know why the dotting test outperformed other, more respectable aptitude tests.

So, I can tell you in which ways women learn better than men – but please don't ask me why. The survey results show conclusively that women are far better at:

- treating everything that happens as an opportunity to learn
- using mistakes as opportunities to learn
- learning from ordinary, everyday happenings and things that happen by coincidence or chance
- using a partner or 'buddy' to help them to learn
- improving the way they learn.

Perhaps all my survey has done is to confirm that Socrates was right when, nearly 2,500 years ago, he said: 'Once made equal to man, woman becomes his superior.'

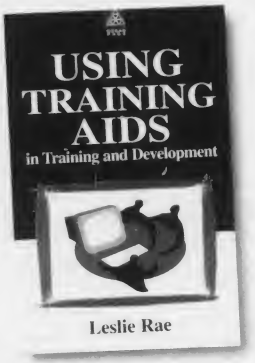
Books

Reviews of new and recently released titles on
using training aids, presentation skills, the New Deal and **creativity.**

Ratings: ★★★★★ excellent; ★★★★ very good; ★★★ good; ★★ average; ★ poor

Using Training Aids in Training and Development

ISBN 0 7494 2806 6
Leslie Rae
Kogan Page, 120 Pentonville Road, London N1 9JN
Paperback £19.99



The statement attributed (like so many) to Confucius that 'I hear and I forget, I see and I remember, I do and I understand' provides a neat entry to Leslie Rae's latest practical guide to getting the most from your training presentation or event. The book sets out to explore how best to move learning at least one step further than the passive act of hearing, and concentrates on the 'see' part of training and/or presentation.

The publication has 11 chapters and a conclusion. The early part, chapters one and two, reprise some basic but very useful ideas including, in chapter one:

- the learning cycle
- learning preferences
- the role of the senses in learning, and
- overcoming barriers to communication.

Chapter two is one of the best overviews of how to choose training and learning aids that I have seen in a long time. The selection matrix at Figure 2 is such a simple but useful idea.

Chapters three through to eight deal thoroughly but succinctly with a full range of training aids from whiteboards to computers. Uses and applications are covered in clear logical prose, well illustrated with figures and diagrams. In fact, throughout the book illustrations of various sorts are well used to support the text, and in a Russian doll way support the basic premise of the book – that is, that learning is enhanced and supported by well chosen and well used visual input. One interesting concept in chapter eight is that trainers are themselves training aids in that they present a model for learners to adopt or relate to.

Chapters nine to 11 deal with such ancillary aids as handouts, activity briefing notes, note taking and case studies. The sections on handouts and note taking contain great wealths of information and practical advice. So often these subjects are at best sketchily dealt with and are often presumed to be learned by osmosis.

Throughout, the style is accessible and easy. The flow is logical and the layout good. Practical tips abound, as do useful insights. Any book by Leslie Rae is a useful addition to a trainer's bookshelves. This one is no exception. Beneficial for both novice and experienced trainers, the book provides an excellent introductory overview and accessible reference for the former and a first-class reminder and overview for the latter.

A good £19.99 worth. ***DB***

Ratings:		*Clarity*	★★★★★
Innovation	★★★★	*Usability*	★★★★★
Readability	★★★★★	*Value*	★★★★★

Your reviewers...

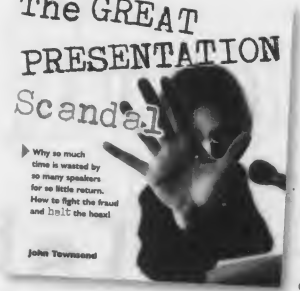
Contact **Leslie Rae** *at Ellray Associates, (tel) 0114 248 3725*

Steve Holman *is senior lecturer at Manchester Metropolitan University, Department of Retail and Marketing. Contact him at (tel) 0161 247 3989*

Diane Bailey *can be contacted at (tel) 01706 659299, (email) training@dba.co.uk or visit (website) www.dba.co.uk*

The Great Presentation Scandal
ISBN 1 87047 167 9

John Townsend
Management Pocketbooks
Paperback (140 x 140 mm) 105 pages
£9.99 plus 60p p&p


The GREAT
PRESENTATION
Scandal
Why so much time is wasted by so many speakers for so little return. How to fight the fraud and halt the hoax!
John Townsend

This book is a product of the publishers who are well known for their management pocketbooks, and of an author internationally known and acclaimed as an expert in trainer and presentation skills. The format (square instead of rectangular, and more textual instead of mainly bullet lists and so on) still retains the stamp of both the publisher and the author, and as such represents a breath of fresh air into the subject of presentations. John considers that so many presentations are frauds and hoaxes. He thinks that something should be done to stop presenters wasting people's time and say something useful, and events should be organised to be eventful instead of ritual rip-offs. Fighting talk! But how many times have you sat through presentations that accurately reflect these descriptions?

The material is directed towards achieving effectiveness and success in presentations and in the first chapter, 'Scandal', the errors of not asking 'Why?' sufficiently often are raised, resulting in the organisers getting away with getting it wrong. Inefficient ritual presentations and their costs are considered, as are the problems of ineffective speakers, timing traps and many other debunks, which are raised in a no-nonsense approach.

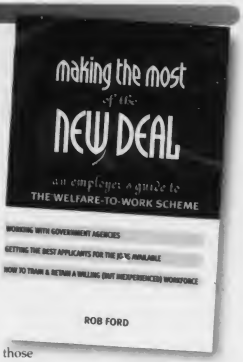
The second chapter is a lively description of the adventures (and misadventures) of a presenter setting off to give a presentation intending to use 43 computer slides (with back-ups and his notes, which are his slides) all of which are lost on the plane. He bravely enters an unscripted presentation, but uses such items as glass bowls, impactive flipchart acronyms, a bag of coins, unusable floppies and CD-ROMS, packs of envelopes, his air ticket and so on, as visual aids and ends up making a memorable presentation.

This is followed up by the author's typical approach to using a variety of impactive methods and aids, based on his model of BOMBER B:

- start with a bang
- give a brief outline of what is ahead
- limit to a maximum of five messages
- provide a bridge between each message
- give examples for each message
- recap, and
- finish with a bang.

The final chapter provides checklists and hoax-halting ideas – many of them novel – for producing effective, impactive and meaningful presentations, which, if followed, can make any presentation more acceptable and valuable to the listeners. If you have ever attended a presentation (either live, on video or on CD-ROM) you will realise that John practises very effectively the advice and guidance given in this book – so it works. Very well recommended. A must for any presenter or would-be presenter, or presentation sponsor or organiser who has to brief their presenter. ***LR***

Ratings:			
Innovation	★★★★★	*Clarity*	★★★★★
Readability	★★★★★	*Usability*	★★★★★
		Value	★★★★★


making the most
of the
NEW DEAL
an employer's guide to
THE WELFARE-TO-WORK SCHEME
WORKING WITH GOVERNMENT AGENCIES
GETTING THE BEST APPLICANTS FOR THE JOB YOU AVAILABLE
HOW TO TRAIN & RETAIN A WILLING (BUT INEXPERIENCED) WORKFORCE
ROB FORD

Making the Most of the New Deal
ISBN 0 7494 2967 4
Rob Ford
Kogan Page, 120 Pentonville Road, London N1 9JN
Paperback £14.99, 106 pages

The basis of this book is the New Deal initiative introduced by the current Labour government as the Welfare-to-Work Scheme and is intended to:

- encourage the use of this scheme, and
- give employers practical guidelines on how to deal with these new employees.

The scheme, launched in April 1998, is intended to obtain employment and training provision for unemployed people, initially aged 18 to 24, later extending to those aged 25+, and to help employers obtain and train new workers with the support of the Employment Service.

Although the basic aim of the book is directed at the New Deal scheme, many trainers will find much to help them as it looks at topics with which trainers are concerned – not just those who are directly involved with New Deal trainees.

This guidebook is clearly and well written for employers (and trainers) and contains nine chapters covering:

- an introduction to the scheme and the inherent advantages
- recruitment processes and techniques
- introducing the new worker to the organisation
- administration
- training decisions
- maintaining motivation, and
- summaries of other opportunities, marketing and what happens at the end.

Many of these topics will have a familiar ring to trainers – particularly those concerned with young workers and those with little work experience – in addition to the main purpose of being impactive, practical and helpful approaches for managers involved in the scheme.

Well worth reading and using by employers considering, starting or already into the New Deal scheme, and worthy of the wider audience as suggested above. ***LR***

Ratings:			
Innovation	★★★★★	*Clarity*	★★★★★
Readability	★★★★★	*Usability*	★★★★★
		Value	★★★★★

Business Beyond the Box
ISBN 1 85788 212 1
John O'Keeffe
Nicholas Brealy, London
Paperback £9.99

This paperback is written in a direct and easy-to-read style, in a bold print, well spaced and comfortably laid out. Picking up the text immediately encourages further reading, and the learning is aided by illustrations and diagrams with highlighted headings and large print for increased emphasis at key junctures.

The book concerns creativity and innovations, pointing out ways that managers can break out of conventional wisdoms and achieve corporate and career breakthroughs – and repeat them. It is a lively and easy-flowing book, which specifically explains how to shift and improve our mental habits to our own and the organisation's benefits.

The book advocates applying the mind to eight thinking strategies based on a concept called triangular thinking. It gives practical examples and case examples of where the system has worked such as the innovative thinking that revitalised the Swiss watch industry with the marketing of the Swatch as a fashion accessory.

The text is suitable for all business personnel; everyone would benefit from reading and applying the processes explained. It would be of particular use to researchers and entrepreneurs who are seeking the cutting edge of knowledge and development.

The author is group vice-president, The Procter & Gamble Company, and he has used these techniques to get breakthrough results in a wide range of businesses. The book does not pretend to be an academic text, as admitted on page 6, nor does it contain wide bibliographies or referencing systems. It is, however, an honest and enthusiastic book that oozes experiences and application. However, I found the money-back guarantee on the last page of the text (page 244) too condescending for my liking and naive comparisons to sending people on courses as opposed to reading the book unnecessary and ill-conceived. ***SH***

Ratings:			
Innovation	★★★★★	*Clarity*	★★★★
Readability	★★★★	*Usability*	★★★★
		Value	★★★★

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Service le

Illustration by Mike Edwards

What are SLAs? What do they contain? And why have them? It's true that putting them into place often changes traditional working arrangements and relationships. So just what are the benefits? **Diane Bailey** provides the answers.

Good customer service is neither a knee-jerk reaction, nor is it a series of superficial behaviours grafted on to the way a business organises itself. Rather, good customer service is a series of complex concepts, interlinked beliefs and managed provision that informs everything an organisation does in preparing for and dealing with its customers, clients, patients or users – however they are labelled.

Many unseen activities plus the quality and efficiency of internal customer service are major factors in ensuring the satisfaction of the external customer (see *Figure 1*). Effective internal customer service needs more than good intentions and well-meaning people (although these certainly help). It often requires clear specification, and real efforts to ensure clear understanding and buy-in.

Diane Bailey *can be contacted at (tel) 01706 659299, (email) training@dba.co.uk or visit (website) www.dba.co.uk*

One very effective way of doing this is to use a service level agreement (SLA). SLAs have been in force in many parts of both the public and the private sector for some time now, and work with varying degrees of success. The less successful SLAs tend to be those devised without the input of user or provider and 'imposed' with little or no consultation. The more effective SLAs are those in which both user and provider are involved and committed in the design and specification.

Background

SLAs are part of a general move towards quality and accountability and emphasise the importance of the internal consumer. They are usually a form of contract between two departments or sections within the same organisation and normally undertake the roles outlined in *Figure 2* (see page 16).

SLAs are related to more general standards used for internal management purposes. They can help to flesh out job descriptions, and appear in some appraisal and performance-related pay systems. Standards can be incorporated, selectively, within service level agreements. SLAs may also be reflected in customer charters.

Charters may precede or follow SLAs. If the former, they may constitute pressure on service providers to meet standards and to respond with more specific SLAs. SLAs are, in general, a tactic used to help organisations become more business-like.

Why do we need to be business-like?

Internal specialist functions such as IT, Personnel and Accounts that are not direct service deliverers or enablers are coming under pressure in many organisations to demonstrate that they contribute positively to achieving corporate and service goals, and that their costs are acceptable in relation to the value of this contribution.

Although this pressure may be experienced most directly in the efforts of organisations to minimise their central overheads, there are several more general influences. These include the ones listed in *Figure 3* (see page 17).

If support functions are to play an important and constructive part in these aspects of management they need to be willing and able to apply the same

evel agreements

principles and practices to their own activities. Ultimately, the aim for all support functions is to raise the quality and effectiveness of services to the customer/user.

What is an SLA?

An SLA is usually a written agreement made between the provider of a service and those receiving it. It is like a contract, but is usually between parts of the same organisation and is not binding in law. Like a contract for services, it: defines the service to be delivered; specifies volumes, quality and timing; confirms agreed levels of charge; and describes how any problems will be handled.

The period covered by SLAs is often the organisation's financial year, but can be for another period – for example, a project life or a trading period.

Why have SLAs?

It is probably easiest to think of this in terms of what the position would be like if we did not have an SLA for a service critical to the success of the business.

Take, for example, an SLA that one organisation has with its IT section for provision of all computer services. Without the agreed SLA there would be no common agreement about what computer services the business needs, when they must be delivered or what quality is required. Additionally, there would be no clearly agreed procedures for dealing with any problems, or breakdowns in the service. Also, the organisation would be unable to monitor service delivery effectively. Finally, users could not demonstrate effectively that they had been charged correctly if they did not know what services they were expecting in relation to what was billed.

These are just some of the more obvious problems that can occur in the absence of an SLA. There are others. Clearly, planning is made more difficult, and it would be harder to meet the objectives and targets agreed for the business each year and set out in the annual business plan.

Benefits

Where SLAs are seen to be appropriate, there are four benefits to be gained. First, providers and users of support services are clearly identified and develop mutual understanding. Second, providers become clearly accountable for the quality and cost of their services. Third, users become aware of the support services they get now and of any additional services they might ask for.

Finally, users can monitor the volume and quality of the services they receive.

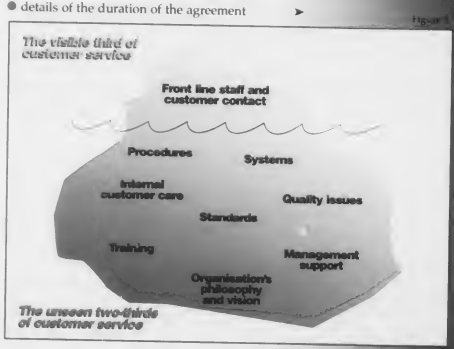
Contents of an SLA

The content of an SLA will depend on many things – for example, the nature of the service being provided, the culture of the organisation and the scope of the agreement (whether there are one or many services; one or many users).

There are a number of key components that should be, at least, considered when developing, or agreeing, an SLA. In general terms, an SLA should be written in a clear and unambiguous style, it should be specific rather than vague, and it should be measurable and relevant to the programme. It should consist of:

- a brief general statement summarising the services to be provided
- definitions of the two parties to the agreement – who is providing the services to whom
- details of the duration of the agreement ➤

Figure 1



vel agreements

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- details of the duration of the agreement

➤

Figure 1

- the arrangements for monitoring and review
- a procedure for settling disputes
- what resources, information or other help the user may have to provide
- contact points for both parties
- the basis of any charges - what has to be paid and how it is to be paid.

Specification and charging

Specifying the services to be provided puts flesh on the bones of the SLA. Specifications for all types of support service could set out the precise nature of each function or service provided, the volumes and quality to be achieved for each of these services, and whether optional services are on offer (if so, what they are and what they cost).

Effective internal customer service needs more than good intentions and well-meaning people

Additionally, they should set out what procedure should be followed if it becomes necessary to vary the agreement or specification and, where applicable, the response times to be achieved by the provider when receiving requests for assistance. Finally, it should give sanctions for non-supply or poor quality.

If charges are to be applied, three types are possible. The first are input-based charges such as an hourly rate based on actual costs, for actual time spent. The second are charges partially dependent on inputs, such as pre-determined (perhaps averaged) hourly rates, charged against actual time spent. The third are charges wholly independent of inputs – for example, pre-set fee scales, schedules of rates and lump sums.

Possible charging methods could include:

- unit charges, such as pre-set sum per person recruited or computer supplied, or a per capita charge per training day for training course attendances
- fixed-price sums for undertaking projects – for example, lump sum charges (as per conventional commercial consultancy practice) for undertaking a staffing or IT review
- daily (or hourly) consultancy rates, for work done on a daywork basis
- lump sum retainer fees (probably annual) for maintaining a general availability to provide advice and assistance.

Charges should always be consistent and unambiguous. The user must know at all times what charges are being accrued. Additionally, they must be understood by the users and be open to their influence – that is, users should be able to influence their own costs by their decisions about the pattern of usage of the services on offer.

The charges should also give users a choice of options – for example, users should be able to choose between paying as they go on a direct usage basis, or selecting a lump sum or general retainer.

Finally, they should be easy to bill and keep account of, and be in a form that facilitates comparisons of the costs and charges for similar services in other departments or external suppliers.

Responsibilities of an SLA manager

Although not legally binding an SLA is, to all intents and purposes, a contract. As such it will need to be managed. It is sensible to appoint named individuals to manage the SLA from both sides. It is the job of the two managers, representing those providing and those receiving the service, to work closely together to ensure the best possible service provision. In general terms SLA managers should:

- know and understand their responsibilities
- know and understand user requirements
- establish the next period's requirements with users and inform the service provider
- review and agree the draft SLA produced by the service provider (or draft the SLA if providing a service)
- communicate to users what the agreed SLA service is and how it is being monitored
- maintain regular contact with the service provider and with service users
- operate effective monitoring arrangements
- operate agreed escalation procedures where necessary
- provide quarterly or regular reports to the appropriate body (or bodies)
- make suggestions for changes/improvements
- work together to resolve problems.

The role of SLAs

Monitoring arrangements

One of the key components of a good SLA is effective monitoring arrangements. Users need to be able to demonstrate that they are getting the specified service to the quality and at the cost agreed.

Monitoring can also be an effective tool in improving performance and in the delivery of services.

To identify improvements needed to an SLA you could ask the following questions. Has the agreed level of service been provided? Is the service being delivered in the correct way, to the agreed standards? Is the service achieving the intended outcomes within the resources allocated? Is the service continuing to take into account the expectations and preferences of the user?

Performance measures

In order to be able to monitor the SLA effectively, it is important to establish suitable performance measures. These need to be Specific, Relevant and Measurable, linked to the agreement.

The key to success is setting up the right performance measures in the first place. You approach this by considering what information you will need to monitor the SLA.

Designing performance measures

Although performance measures are specific to the particular SLA, there are some general questions that may help you to design the best performance measures for your needs. What is to be measured (for example, the particular service aspect)? Why is it to be measured (for example, what use is the information to be put to)? Where is it to be measured? When is measuring to take place? What is the basis of measurement (per cent error free, judgement – for example, up to professional standards)? What source data is to be used? How easy is this to get hold of/generate? What software/other tools are to be used? Have we got access to software? What procedures are to be adopted?

What assumptions are made? (Agree these clearly with supplier to avoid disputes.) What reports will be produced? What method? To whom? What format? How often? When are reports to be produced? At what time of year?

People in SLAs

So far, this article has talked about the content and monitoring of SLAs. One vital area is the people involved – the suppliers and users – in bringing the contract to life.

Putting an SLA into place often changes traditional working arrangements and relationships. Colleagues who have previously had little, if any, understanding of how their work impacts on others are suddenly contracted to work in certain ways and offer certain standards.

The pressure to be business-like

The general influences to be business like include the following.

- The government is considering the extension of compulsory com tendering to support services such as finance and personnel ac the Civil Service.
- Financial constraints mean it is important to ensure that every sp function operates on a value-for-money basis.
- Cost centre management requires the use of cost accounting sy which can provide managers with effective control data on every aspect of business-like activity.
- There is a growth of concern for policies and processes that sec high quality in all aspects of an organisation.
- Many organisations are using business plans, quality assurance some extent, service level agreements, as the means whereby hi management standards – and therefore more efficient, effective a higher quality services – may be achieved.

At worst, colleagues who have little liking or respect for other colleagues can feel they are being forced to provide a service that they see as unreasonable or unrealistic. Staff attitudes towards SLAs can be resistant and negative where the individuals involved have not been involved in the development of the SLA or properly informed of the reason(s) for it and the requirements it makes. Some sections or departments such as finance or IT can view themselves as driving forces rather than as service departments – and resentments can run high.

At best, willing colleagues may not understand the reasons for the SLA and may suspect implied criticism.

To make sure that an SLA runs effectively and that the people concerned honour their responsibilities, a planned programme of information and training will be necessary. At a minimum this should cover: the business reason(s) behind the SLA; the internal customer (supplier chain and its requirements); the reasons the client/customer group requires a guarantee of service level; the behaviours, skills and competences required of people in the service providing section; individual, team and group responsibilities; consequences to the client and to the business of failing to honour the SLA requirements; monitoring and maintenance arrangements; and sanctions agreed.

SLAs can be a very powerful method of formalising levels of service provided to internal customers

Conclusion

SLAs can be a very powerful method of formalising levels of service provided to internal customers. To be effective they need to be business linked, clearly specified, fully understood by both supplier and user, supported fully by staff involved, managed effectively, and operated by fully trained and informed individuals.

- the arrangements for monitoring and review
- a procedure for settling disputes
- what resources, information or other help the user may have to provide
- contact points for both parties
- the basis of any charges - what has to be paid and how it is to be paid.

Specifying the services to be provided puts flesh on the bones of the SLA. Specifications for all types of support service could set out the precise nature of each function or service provided, the volumes

Effective internal customer service needs more than good intentions and well-meaning people

and quality to be achieved for each of these services, and whether optional services are on offer (if so, what they are and what they cost).

Additionally, they should set out what procedure should be followed if it becomes necessary to vary the agreement or specification and, where applicable, the response times to be achieved by the provider when receiving requests for assistance. Finally, it should give sanctions for non-supply or poor quality.

If charges are to be applied, three types are possible. The first are input-based charges such as an hourly rate based on actual costs, for actual time spent. The second are charges partially dependent on inputs, such as pre-determined (perhaps averaged) hourly rates, charged against actual time spent. The third are charges wholly independent of inputs – for example, pre-set fee scales, schedules of rates and lump sums.

Possible charging methods could include:

- unit charges, such as pre-set sum per person recruited or computer supplied, or a per capita charge per training day for training course attendances
- fixed-price sums for undertaking projects – for example, lump sum charges (as per conventional commercial consultancy practice) for undertaking a staffing or IT review
- daily (or hourly) consultancy rates, for work done on a daywork basis
- lump sum retainer fees (probably annual) for maintaining a general availability to provide advice and assistance.

Charges should always be consistent and unambiguous. The user must know at all times what charges are being accrued. Additionally, they must be understood by the users and be open to their influence – that is, users should be able to influence their own costs by their decisions about the pattern of usage of the services on offer.

The charges should also give users a choice of options – for example, users should be able to choose between paying as they go on a direct usage basis, or selecting a lump sum or general retainer.

Finally, they should be easy to bill and keep account of, and be in a form that facilitates comparisons of the costs and charges for similar services in other departments or external suppliers.

Although not legally binding an SLA is, to all intents and purposes, a contract. As such it will need to be managed. It is sensible to appoint named individuals to manage the SLA from both sides. It is the job of the two managers, representing those providing and those receiving the service, to work closely together to ensure the best possible service provision. In general terms SLA managers should:

- know and understand their responsibilities
- know and understand user requirements
- establish the next period's requirements with users and inform the service provider
- review and agree the draft SLA produced by the service provider (or draft the SLA it providing a service)
- communicate to users what the agreed SLA service is and how it is being monitored
- maintain regular contact with the service provider and with service users
- operate effective monitoring arrangements
- operate agreed escalation procedures where necessary
- provide quarterly or regular reports to the appropriate body (or bodies)
- make suggestions for changes/improvements
- work together to resolve problems.

Figure 2

The role of SLAs

SLAs normally:

- specify the nature of the service provided
- identify the provider of, and customer for, the service
- specify the level of the service provided – including frequency, coverage and time scales
- incorporate limitations (this may include details of refunds or compensation if things do not go to plan)
- indicate quality
- make expectations explicit
- help to promote the service/service provider
- assist communication
- on occasions, help to clarify the service that can be expected and what is not available
- ensure that providers become accountable for delivering the service and its quality
- indicate personal responsibilities and accountabilities of both supplier and customer
- include charges to be applied (where these exist)
- ensure that customers/users become aware of the costs of the service and any additional cost if they change their minds or their requirements.

The pressure to be business-like

The general influences to be business like include the following.

- The government is considering the extension of compulsory competitive tendering to support services such as finance and personnel across the Civil Service.
- Financial constraints mean it is important to ensure that every specialist function operates on a value-for-money basis.
- Cost centre management requires the use of cost accounting systems which can provide managers with effective control data on every aspect of business-like activity.
- There is a growth of concern for policies and processes that secure high quality in all aspects of an organisation.
- Many organisations are using business plans, quality assurance and, to some extent, service level agreements, as the means whereby higher management standards – and therefore more efficient, effective and higher quality services – may be achieved.

Figure 3

One of the key components of a good SLA is effective monitoring arrangements. Users need to be able to demonstrate that they are getting the specified service to the quality and at the cost agreed.

Monitoring can also be an effective tool in improving performance and in the delivery of services.

To identify improvements needed to an SLA you could ask the following questions. Has the agreed level of service been provided? Is the service being delivered in the correct way, to the agreed standards? Is the service achieving the intended outcomes within the resources allocated? Is the service continuing to take into account the expectations and preferences of the user?

In order to be able to monitor the SLA effectively, it is important to establish suitable performance measures. These need to be Specific, Relevant and Measurable, linked to the agreement.

The key to success is setting up the right performance measures in the first place. You approach this by considering what information you will need to monitor the SLA.

Although performance measures are specific to the particular SLA, there are some general questions that may help you to design the best performance measures for your needs. What is to be measured (for example, the particular service aspect)? Why is it to be measured (for example, what use is the information to be put to)? Where is it to be measured? When is measuring to take place? What is the basis of measurement (per cent error free, judgement – for example, up to professional standards)? What source data is to be used? How easy is this to get hold of/generate? What software/other tools are to be used? Have we got access to software? What procedures are to be adopted?

What assumptions are made? (Agree these clearly with supplier to avoid disputes.) What reports will be produced? What method? To whom? What format? How often? When are reports to be produced? At what time of year?

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Why are ser
so low?

rvice standards

Steve Shallabear explores the conditions that affect companies attempting to provide customer care and offers suggestions as to how they might organise themselves better to provide it.

There's a plethora of information available about how to look after your customer. Many of us working in training and business feel like we've heard it all before. Simple principle-based truisms such as 'the customer's always right' and 'put the customer first', which many of us can remember being prominent years ago, have evolved into more sophisticated concepts such as 'relationship management' and 'adding value'.

How these terms are defined often depends on the consultant you speak with. However, most would agree that customer care is an important component of most commercial training programmes, if not the organising principle. It has to be. All organisations have customers of some kind, whether internal or external. Satisfying them is intrinsic to any organisation's survival and growth.

Assuming you are a training professional who has worked on customer care, it's likely you'll be aware of information such as 'it's six times more expensive to generate new customers, as opposed to selling to existing ones'. You are also likely to be familiar with commonly quoted figures like 'a dissatisfied customer tells 13 to 16 people about their experiences, as opposed to a satisfied customer who only tells five'.

Research tells us that 69 per cent of customers leave their suppliers for 'people-based reasons'. In my experience, this type of information is regularly given to front-line staff in training sessions. For many delegates hearing it for the first time, it carries a strong impact. Certainly no one will seriously dispute the importance of empathising with customers, anticipating their needs and being proactive in helping them to get what they want. ➤

Steve Shallabear [illegible]

Yet, even with this seemingly obvious commercial imperative and the multitude of information available in the public domain, poor service is rampant. If you doubt this is the case, I challenge you to ask any group you're training or working with for examples of good and poor service they've experienced as customers. I've found that most participants can recall two or three recent stories of being badly

As human beings we have a tendency to recall events where we experienced strong negative thoughts and feelings

treated to every one positive experience. In most cases, how the staff served – or didn't serve – them, as well as the eventual outcome, were important. The reason for this could be that as human beings we have a tendency to recall events where we experienced strong negative thoughts and feelings. Perhaps our self-image or pride was hurt, or we had to argue our case and felt misunderstood, the emotion etching it into our memories.

Certainly, it is easy to take good service for granted and dismiss it as the norm or something that 'I'm paying for'. While this attitude is prevalent in customers it can be compounded by front-line staff who simply go through the motions in their jobs, doing nothing more and nothing less. Staff who give a processed response devoid of any emotion or interest are likely to provoke the same types of feeling and behaviour. Similarly, using company or industry jargon may intimidate or mystify customers who may not feel able to say they don't understand.

For front-line customer facing staff it can be all too easy to think, 'I've heard it all before' when dealing with a complaint. Unfortunately this can stereotype the customer as 'a difficult one' or 'professional complainer'. These are indicators of a defensive strategy that polarise supplier and customer into opposing camps.

De Board (1978)[1] tells us these are social defence systems that help individuals avoid feelings of anxiety, guilt and uncertainty. In reality any pain relief is likely to be short-lived, as most customers will react in return, which can cause the situation to spiral out of control and into conflict, to the dissatisfaction of both parties.

Management's involvement

In most large commercial organisations, top management have long espoused the value of customer care and their intentions to provide a quality service. In review meetings it is not uncommon to hear senior managers or directors lament the service their customers receive.

Invariably it is the perceived deliverers or front-line customer service staff who take the blame. Cries of 'What's happened to our staff these days? Can't they think for themselves?' or 'You just can't get good people any more' can often mask management's own involvement in an organisational predicament that they both perpetuate and are victims of.

From my work experience, this scenario is common in some of the top FTSE companies that are household names. It is particularly prevalent where mergers, take-overs and redundancies have eaten away at the relational fabric, culture and systems that provided the foundations from which the organisation derived its strength and reputation.

In those companies both new and old staff cease to identify with the organisations' objectives, and instead pursue a path of self-interest and 'looking after number one'. Customer care then happens sporadically and largely at the discretion of isolated individuals. Egan (1994)[2] describes this as the 'shadow side of an organisation'.

These issues may never be openly acknowledged internally or externally, as they can be too threatening to deal with and risk damaging the 'perfect brand image' the organisation has built in the market-place. However, for those working within the organisation or receiving a service from it the realities are apparent.

Typical indicators of this condition internally are as follows:

- departmental politics
- empire building
- blaming others
- withholding information from colleagues, and (in extreme cases)
- sabotaging company or colleagues' work.

External impacts on the customer can be:

- broken agreements
- missed deadlines
- inferior quality products and services
- lack of communication, and
- rudeness.

There are psychological, social and financial costs to be paid for by both individuals and the company for allowing these factors to continue.

Even in established organisations, it's rare to find consistently good customer care. I believe the majority of people have not been given the education that equips them to provide it. To truly serve another requires subjugating your own ego needs to theirs, albeit for a limited period, in many

customer transactions. This requires attention, discipline and compassion, apart from any skills relevant to the job.

While the eventual pay off can be a 'win-win' outcome, this is distinctly unfashionable in a society where many icons become successful through asserting their personalities, independence and a 'me-first' attitude.

Taking responsibility or ownership is also perceived as a threat by many, as is engaging in any form of authentic communication that may make them feel vulnerable. Then customers receive a robotic response that only serves to fuel their irritation.

To avoid this, effective customer service staff must have a degree of self-awareness achieved through personal development and professional development work on skills such as communication and rapport building. Unfortunately, this need is often unrecognised by organisations that only supply technique-based training programmes.

This awareness and skill must be cultivated, monitored and managed at an organisational level if service levels are to rise. Clutterbuck, Clark and Armistead (1993)[3] say that 'managing every service encounter' is necessary to truly offer inspired customer care. This view may be known to many thanks to Scandinavian Airlines' president, Jan Carlzon, who said: 'We have 50,000 moments of truth out there every day.'

Carlzon maintained that every single contact with the customer provided an opportunity to create an impression of the company.

The *Daily Telegraph*, reporting on customer service (1999)[4] recently quoted Sir Freddy Laker, who endorses that stance. He is reported to have said if ashtrays on his planes weren't emptied regularly, his passengers would assume that the engines weren't serviced properly either.

As a customer it is not unrealistic to make assumptions of this kind. Have you ever gone shopping for something only to find yourself being 'served' by someone with the visual impact of a zombie, who stares blankly at you and mumbles incoherently, while you try your best to make your needs understood? You make a purchase or arrange for a job to be done only to discover you were given the wrong goods or mistakes have been made.

Where do you start?

Taking full responsibility for the service the organisation provides can often seem a daunting task for managers and change agents. It is important to keep your vision in mind, a sense of perspective and remember that people are genuinely interested in making a contribution - particularly when there is something in it for them.

Audit the organisation of the department(s) concerned. Identify their strengths, weaknesses and shortfalls in customer care performance standards. Within the audit test the climate for change. Ascertain how will it be received; who will support it; oppose it or sit on the fence? Determine the issues and concerns staff have and how these may be addressed.

Define the customer service strategy. Use market research to define what the company should be offering its customers. Undertake competitor analysis, analyse trends, and review past and present images of the organisation as perceived by customers. Consider the commercial opportunities and how to position the company to maximise on them.

Review processes, procedures, skill sets and levels of staff empowerment. Design a training and communications programme that builds capability and informs the organisation about progress of the new initiative and achievement of service levels. Promote the company as a champion of customer care to staff and customers. Ensure a reinforcement programme is designed to transport new skills and attitudes back to the workplace. Managers must be seen to model the new behaviour they wish to cultivate in their staff.

Provide ongoing support. The new initiative will need ongoing management support if is not to become "flavour of the month" and go the way of past initiatives. Build in rewards to reinforce new behaviour. Plan for, and monitor, gradual and sustained improvements over two to three years that allow the new service ethic, culture and skills to become fully integrated.

Review related areas, such as HR and recruitment, within the organisation. For example, why battle with changing the attitudes and behaviour of staff with a poor customer orientation when you could recruit people with talent and aptitude for customer care.

Consequently, if you are taking the first steps in a major initiative, the approach outlined above may prove useful.

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Managing the psychological and behavioural factors in providing excellent customer care can be achieved by those who have the courage, competence and commitment to do so. With customer care increasingly becoming the main differentiator between companies offering near identical products/services at similar prices, for those that do the rewards will be great. Those that don't tace an uncertain future.

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Taking the first steps in a major initiative

- Audit the organisation of the department(s) concerned. Identify their strengths, weaknesses and shortfalls in customer care performance standards. Within the audit, test the climate for change. Ascertain how will it be received; who will support it, oppose it or sit on the fence? Determine the issues and concerns staff have and how these may be addressed.
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Creative customer contact

... the key to your customers' heart-ts

Organisations of today are still competing to offer the best possible service and, as **Carole Williams** learned some 30 years ago, it is all about seeing, hearing and feeling the way from the customer's point of view. The most successful always keep this in sight.

It is interesting to see that many successful organisations are returning to traditional customer values and linking them with the latest communications technology. This is the way forward for customer service, seeking to appeal to customers' individual emotions, personalities and behaviours. Those organisations that continue to try to deal with the customer as a collective will be left trailing behind. In the garden of customer service they will become the thorns.

When I was young, my father was a shopkeeper (no, this is not Margaret Thatcher's autobiography). Some 30 years later, I realised it was in my father's shop that I began to develop my passion for customer service and hone what are now called NLP (Neuro Linguistic Programming) rapport skills. I would spend long hours just watching and listening, as my parents interacted with customers and suppliers from all walks of life and from all parts of the world (we lived only a short distance from one of the world's busiest ports).

I watched how customers responded, and I listened to how they made their choices and selections. I noted what was important to them and also how they made their purchase decisions. I also watched my parents handling a variety of difficult situations from a well known and respected customer who was shoplifting, to a group of drunken seamen, an employee suffering a heart attack and customers' children displaying some very unpleasant behaviours.

It was also an experience to see problem solving in action – for example, dealing with fridges, which were packed with food worth thousands of pounds, cutting out during the height of summer, and lorries careering through the window. Through all this, I seem to recall that the only customers we ever 'lost' had either moved away or had died. Even then, the ones who had moved still called in when they returned to the area.

Organisations that achieve this feeling of a home from home will prosper and thrive in the future. Tapping in to your customers' and employees' values and emotions will pay dividends. Winning the hearts and minds of both is vital. But just how can you do that?

Communication technology

Using the communication skills of NLP and linking them to the creativity that we all have, it is possible to tune into what customers want and need. At the same time, you can raise the awareness of your own employees about their individual behavioural patterns and encourage them to tap into the 'self'. Link this to the principles of happiness, and you have a key to creative customer contact. The avenues that need to be explored and exploited thoroughly are:

- self-awareness (centring)
- values
- motivation
- happiness
- creativity.

When these are explored and exploited, organisations become much happier places in which to work and customer needs are fulfilled.

Every employee holds the emotional key to the heart of your customers. You can find ways to turn this key and enter into the real world of customer satisfaction. So, why are we hiding our light under a bushel?

Hidden potential

There is so much potential locked inside organisations in terms of their employees and customers. Unleashing that potential will release creativity within the organisation, which will unleash a renewed interest from your customers. In some cases employees have been so moulded by organisations that they have forgotten who they really are, because they are not celebrated as individuals. This leads to people coming to work, doing a job and going home again. The spirit is lost.

So how can you begin to tap into the potential of your employees that lies buried beneath the surface? The trick is to encourage employees to behave like pulsating stars. This means that they will constantly shine, continuing to become brighter every time they have contact with a new customer. You need to help them learn how to regenerate the spirit of entrepreneurialism and to understand why it's important, not only for the customers, but also for them, to lead a fulfilling life at work.

Self-centred

In the past, billions of pounds have been invested in processes, systems, technology and measuring, analysing and evaluating customer service. Less has been invested in the development of employees and yet so many organisations I visit bemoan the low morale of their teams.

A happy, self-centred, motivated workforce will pay dividends at the end of the day. In order to be self-centred employees need to learn how to appreciate and handle their own approach to work and life. Smart organisations have realised that intelligence does not lie in the world of academia alone; there is a new intelligence emerging – creative intelligence. There is an intelligence of the mind that requires whole brain thinking rather than the left brain style, towards which our education systems and business communities have driven us over the past decade.

Research indicates that this was born out of the industrial revolution in the 1960s. We installed massive pieces of machinery and equipment, and our focus was on the functionality of these machines and how we could improve processes and systems to make more, faster. This numbed our learning a little as we relied on machinery to create wealth for us, rather than tapping into our own intellectual wealth. The 70s continued this focus with the production revolution; the 80s, finance; and the 90s, the age of technology.

In the 21st century the new age will be information and people, and the power base will be people's minds and intellectual wealth. This will swing the barometer across to right brain thinking and encourage balance, offering opportunities to develop a whole brain approach to business.

Foolhardy is the organisation that stakes its reputation on satisfaction questionnaires and monitoring and evaluation processes that focus on the past. We must look to the future and develop individuals to have insight into themselves and therefore the customer. It will be a wiser investment for the future to begin tapping in to the minds of employees and customers. This will alleviate the stress that creates much of the tension within organisations today, which we often experience as the customer.

> **Tapping in to your customers' and employees' values and emotions will pay dividends**

The mind is key, but where is the key to the mind?

Living in a stress-free zone

Another multi-million pound industry that has sprung up is stress management. If you need to buy stress management for employees, your customers are likely to be stressed too. Your customers are a mirror of what your organisation is offering to its customers. So, if you have difficult customers, are failing to retain customers or have uninspired customers, turn the mirror around and ➤

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take a long hard look at how you are motivating your employees. Motivational methods need to be finely tuned in order to work for individual employees and customers. How about encouraging managers to turn stress on its head, and offer happiness and laughter workshops instead. Happiness and laughter workshops offer individuals the opportunity to reflect on their own values and what motivates them.

We need to nurture customers and ensure they are big cogs in a little wheel

They can learn:

- to change long-held beliefs that might be outdated and may be holding back their own learning
- approaches to difficult or potentially stressful situations
- how to motivate themselves and others
- how to reframe judgmental attitudes
- to understand the difference between perception and reality
- how to understand their own values
- how to achieve true happiness
- how to create laughter in their lives.

All of this will radiate out in the service to the customer – just like the small shopkeeper giving free lollipops to children. It costs the organisation relatively little and yet the rewards are immense.

Values

Values are the treasures of life. They enrich our lives and are what we are striving for. Values also evoke emotion in our souls. If we tap into employee values and link them with organisational values, we can tap into customer values. Get to their hearts and you get to their heads.

Everyone has emotional drivers based around their own values. It is doing every organisation a great service if managers take the time to invest in finding out their employees' values, how they complement the organisation's and how this can help them to understand customer values.

Customers do vote with their feet. More and more, they want to feel part of an organisation. They want to belong to a club that will share benefits and add to the values in their lives. We have only to look into the purses of shoppers in the high street to notice how many loyalty cards each one holds – although maybe we should rename them 'ticklety cards'. Since so many high street retailers have jumped on the bandwagon and consumers are out to get the best value, loyalty no longer comes into the equation. Smart organisations make life easy for the customer, through encouraging a working environment for employees that is meaningful, diverse, creative, fulfilling and fun.

How many times have you struggled around a supermarket with a wobbly or sticky-wheeled shopping trolley and nearly given yourself a hernia? Sainsbury's now has a system in some stores that enables the customer to tie a tag on to a faulty trolley to identify it as such.

The key word here is 'enable'. There is a direct correlation between enabling employees and enabling customers. It is now recognised that some intangible forces that are not measurable do make a difference to profit.

Another return to traditional values is that of a delivery service. Major retailers and supermarkets are all trying to take business to people's homes and make life easier for them by delivering. Most bygone businesses see that as a matter of principle rather than a competitive marketing ploy. But it has to be genuine as well as convenient. If it is genuine, there will also be appropriate training for the 'delivery person'. Have we come full circle?

A bit like Henry Ford originally painting all his cars black, sometimes organisations try to clone employees in an effort to develop a culture for the organisation. This assumes sameness and will undoubtedly lead to the customer being treated as 'the same' rather than as individuals. The difference between Ford and modern organisations is that Henry did not have the technology to paint the cars any other colour and maintain a competitive price. Today we do.

Motivators

Employees and customers are all motivated in different ways and so employing one motivational style across a team or customer base inevitably does not always bring the desired results.

Some are motivated away from pain while others are motivated towards pleasure and achievement of goals. Some are internally referenced – that is, they have a spirit of entrepreneurialism and will forge forward not worrying too much about what others think. Others are externally referenced, and what other people feel and think about them really matters.

We also know from satisfaction surveys carried out on customers that they vary from region to region. What is considered good service in one area of the country may be considered as average to poor in another.

Motivating each person individually as well as motivating the team and the organisation takes courage, commitment and determination, but it's a heck of a lot of fun!

Happiness

Millions of people are searching for happiness and indeed hundreds of billions of pounds are

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invested every year in trying to make customers happy so that they will come back to our corner shop again and again until they have either moved away or died. In today's technology the moving away is no longer a problem with the Internet creating virtual living rooms in customers' homes. When our customers die we should try to ensure that we are still serving the next generation.

My parents' business watched customers' children develop through marriage and parenthood, and we celebrated and genuinely cared about each generation as it came along. Even though my father is now dead, my mother still socialises with many of the customers who were patrons of our business.

The great joke about happiness is that it is here rightnow for everyone. If only we know how to tap in to it. We tend to think that we have to suffer if we are to be happy at all, which is a complete myth. Happiness is heart-shaped for the customers when values and individuality are celebrated among employees. When employees are celebrated and motivated they become more committed.

It is often the things that are intangible and hard to measure that make the real difference to customers – attitude, cheerfulness and helpfulness, going out of your way, even becoming a friend. However, our left brain past has led us to think that we must be able to measure everything and that everything must be logical. Read the whole body of your customer. This requires full attention to the customer. How many people do you interact with each day who do not even look at you? Whole body reading means taking the time to step outside your own internal state and look at what is happening to and for the customer.

Creativity

Creativity has a new meaning in modern business. Every time I ask an audience 'Who thinks that they are creative?' about three people tentatively raise their hands. It will be important for all individuals to be encouraged to celebrate their own creativity. Equally important for each organisation is the need to find new ways of encouraging creativity in employees that will aid creative customer contact and solutions.

Facilitators and managers have an important part to play in this brave new arena. It is not possible to own employees or customers. It is possible, however, to continue learning how to develop creativity and individuality in teams and across organisations. New ways of working, learning partnerships and outer zone thinking will all help to forge a new way of looking at and developing creative thinking.

Long story, short space!

I recently had cause to complain to a large office stationery store. Its staff were very apologetic and said they would get onto the job right away; additionally, it would be free of charge, which I gratefully accepted.

My colleague collected the job on my behalf (ten minutes prior to the store closing) but when she returned I discovered only half the work had been completed.

My pressure valve was beginning to gather steam. I phoned the manager – another profuse apology. What could they do to help? They offered to re-do the work for the following day, again free of charge. I explained that cost was not an issue. The problem was getting to the store the following day, so I asked if they would collect.

The manager explained that the store was not insured to collect goods. I suggested a taxi. His response was, 'I hadn't thought of that.'

To cut a long story short, a taxi was arranged to collect the work from me. When he arrived, I also asked him to purchase a couple of other items of stationery while he was at the store.

To cut the short version of the story even shorter, the print manager rang three times to inform me of what was happening and explained why

How many people do you interact with each day who do not even look at you?

things had gone wrong. The goods were returned in a taxi at the allotted time with my additional items of stationery all free of charge. The morals of this tale are:

- every employee was empowered to do something for me – from the print room salesperson who offered the service free for having not completed on time, to the manager who went ahead with my request for a taxi to collect and deliver, to the print room manager who sent my other stationery items free of charge
- each employee was friendly and they all admitted their mistakes
- the manager listened and responded to the values that were important to me – that is, inconvenience rather than cost
- the manager listened to my solution to the problem, then actioned my desired outcome.

Result

As the customer I was encouraged to feel important, respected and valued. The store actioned a creative solution, which was developed in partnership with me. It now has a very happy customer; I will never go anywhere else for stationery requirements. And guess how many people I've told?

Managing organisational change

The process of organisational change should be the responsibility of the whole organisation, which should embrace that change and be committed to its success, suggests **Roy Hudson** who offers some advice on how this can be achieved.

The responsibility for the implementation and ongoing management of change within an organisation is often allocated to the HR or personnel manager who is forced to oversee the change process and assume the role of 'change agent'.

However, I believe that it is impossible for one person single-handedly to implement a process of organisational change as the activity requires a range of skills and depth of knowledge that no one individual could possess.

Before embarking on any journey of change, an organisation must address a number of issues. Primarily, it must sit back and examine its motives for the change. There is little point in an organisation wanting to improve the quality of its offer if it is not prepared to commit time and resources to the change task. Even then, the process cannot be implemented and carried out by one person alone; the whole organisation must embrace the change and be committed to its success.

Successful implementation of a change requires hard work and continuous effort. An organisation cannot expect to improve performance in any area by doing things the same way it has always done them. Change must take place. HR managers can adopt the all-important role of the 'change agent', but they should not be made entirely responsible for its success. This is the equal responsibility of all individuals within the organisation regardless of their position or status.

From my experience with a wide variety of companies it is possible to see that effective change will only take place when all employees, right through the organisation, accept responsibility for improving the quality of the elements of their jobs where the action is under their direct control. In these cases the role of the HR manager changes from that of 'problem solver' to that of facilitator and expediter.

Well-planned and well-executed training must lead the change process. And this is one of the reasons why the responsibility for change management often falls to the HR manager. For real behavioural change and significant performance improvement to take place, solid training specific to each individual need is required. Training that is not 'needs based' or is 'just in time' wastes everybody's time and, more importantly, serves to demotivate most of the people involved.

I believe that the success of any change programme is heavily dependent on a number of key personnel. The leadership and commitment of the chief executive and key figures at the top of the organisation are paramount, but the knowledge and skills of the HR manager in the role of 'change agent' are equally important if they are to secure the commitment of the employees within the organisation and facilitate the change in culture and business architecture.

For any individual to take on the role of change agent they need to be able to deploy the appropriate methods and techniques from those that are currently available – the starting point of which must be a clear understanding of where the business currently is, where it is hoping to be in the future and how it intends to facilitate the change.

Making the change

There is a three-phase change agent and team competency development process that can be

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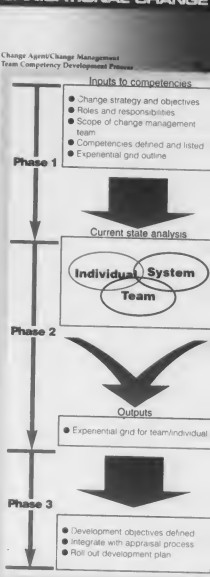


applied to any organisation in its quest for change (see *Figure 1*).

The first phase of the process is to look at what the organisation is trying to achieve. From this starting point it is possible to put together change objectives and a strategy to achieve those objectives. Roles and responsibilities of individuals are assigned, and the theoretical competency of each individual is identified and listed in terms of what they need to do the job. An outline experiential grid or 'knowledge programme' is then drawn up, establishing the level of understanding needed at every stage of the change process.

This leads onto phase two, a current state analysis, which is designed to give a 'snap-shot' picture of the company at that moment in time. Individual as well as team capabilities are analysed, along with the present systems in place to enable these capabilities.

The final phase of analysis enables competency deficiencies to be identified and 'real life' experiential grids can be drawn up for the change team as well as other individuals in the organisation involved in the change process. These change development objectives are then integrated into the employee's existing appraisal process and the development plan can be rolled out.

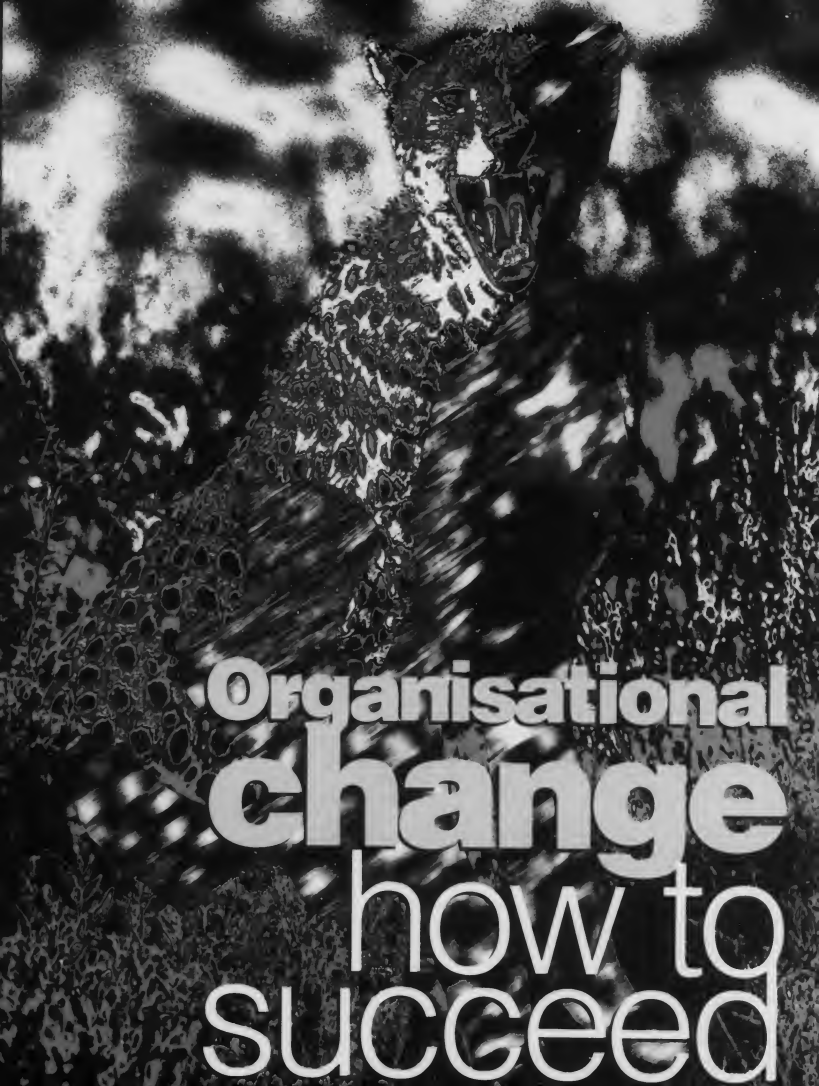
Practical advice

I offer the following practical advice to the HR or personnel manager who has been assigned the change agent role.

- Ensure all employees clearly understand what business the organisation is in and who the customer is. A clear definition of the purpose of the change is also very useful.
- Encourage employees to continually review the question 'What does the change mean for me and how must I change the way I behave?'
- Ensure that new performance requirements are clearly stated and understood by the employees who are expected to change their behaviours and the way they conduct business.
- Ensure that as change takes place new 'rules of the game' are developed. Roles and responsibilities must be updated to reflect new performance demands. The performance management system must also be strengthened to meet the needs for continuous personal and organisational performance.
- Manage and effect the behaviours, values and supply of timely and useful information to enable customer-focused and cost effective decision making to take place at all levels on a daily basis.
- Ensure that core processes are aligned with organisational goals and continually improved. Leaders and employees must have the requisite skills in leadership, facilitation, creativity, problem solving, process management and business improvement.
- Reshape the culture of the organisation in ways that motivate all employees to care for it as if it were their own.
- Continually strive to involve more people as the organisation gets further along the change journey to ensure momentum is gradually built up.

Five ways to ensure smooth change

1. Before you begin, clearly define the purpose of the change programme and what it is designed to achieve. Gain the commitment of the senior sponsor before starting any change programme.
2. Continually review the process and how it is working towards achieving the overall aim.
3. Ensure that everyone within the organisation understands what is to be achieved through the change process and what their role within it is.
4. Strive to involve the whole organisation in the programme.
5. Empower leaders and employees with the requisite skills to ensure that the change process can take place at all levels on a day-to-day basis.



Organisational change

how to succeed

Although change is prevalent in the workplace it seems inevitable that it will cause pressure in an organisation whenever and wherever it occurs. **Nicola Dore** suggests some solutions.

Organisational change is often time consuming and difficult to manage successfully. And if employees do not feel comfortable with the rate of change in their organisation, its success is bound to be limited. The most significant types of change at the present time include mergers, take-overs and acquisitions, and they have become a way of life for employees and managers alike. This is indicative of the fact that the number of take-overs more than doubled in the three years from 1988 to 1991.

Sir John Harvey Jones, former chairman of Imperial Chemical Industries (ICI), commented in the *Observer* in October 1988 that 'half the European companies will disappear' due to an increase in mergers and take-overs. The evidence leading towards this prediction includes mergers between companies such as Commercial Union and General Accident, telecommunications companies to form the new Cable & Wireless, Glaxo and Wellcome, Guinness and GrandMetropolitan, and BP Amoco to name but a few. This indicates that it is not restricted to one particular type of industry; rather, any industry can be involved in this type of change.

An Industrial Society survey[1] found that 94 per cent of respondents had gone, or are going, through a culture change process within their organisation and only 9 per cent of those questioned actually wanted to change the way they work. The aforementioned survey also found that 'failure figures for culture change initiatives range from 80 per cent to 25 per cent' – a concern for any organisation.

While mergers and take-overs are common, different organisations manage the change differently depending, to a large extent, on the organisation's culture and management style.

Organisational culture and change

One of the main factors involved in a merger or take-over is the effect on organisational culture. Michael Armstrong defines culture as 'the pattern of shared beliefs, attitudes, assumptions and values in an organisation which shape the way people act and interact and influence strongly the way in which things get done'.[2]

This may sound long-winded, but the effect culture can have on organisational performance is profound. Thus, getting it right is paramount to an organisation's success. Charles Handy[3] defines culture in four categories – power culture, role culture, task culture and person culture – which are well known and utilised worldwide.

While Handy defines these cultures, he also acknowledges that they are difficult to apply to individual organisations as it is something that is perceived. However, certain characteristics will be dominant within the organisation. The factors that affect culture include the company history, its size (for instance, large organisations are usually more formal and therefore have more rules and procedures), its goals, the environment and the changes within it, and its people and the culture in which they feel most comfortable.

Organisations may also have different cultures within functions such as individual departments or branches, which will depend on the aforementioned factors.

In determining culture it is important to remember that it may change depending on current projects, financial stability, and/or a change in company structure and the management team/style.

While change can bring about positive benefits, it is inevitably the negative effects that become apparent if the process is mis-managed. People fear change, particularly if there is a lack of communication. Common problems facing organisations during this time are shown in *Figure 1* (page 30).

Errors organisations make

In order to ensure that the change process runs smoothly, it is essential that organisations are aware of the pitfalls they can easily fall into and adopt measures to minimise the effect. It is inevitable that change will have a downside due to fear of the unknown. However, if handled correctly, the effects need not be catastrophic. An organisation will usually make one or more of the following errors:

- being complacent
- lack of senior management support and leadership
- allowing corporate vision to diminish
- lack of clear and regular communication
- lack of cultural understanding
- lack of training.

Complacency

Senior management tend to overestimate employee loyalty in times of change and become complacent about the impact the change is having. Planning to take potential problems into consideration in advance will help, as will obtaining regular feedback from employees about their views, opinions and concerns. ➤

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Senior management support and leadership

During times of change, senior management should be seen around the workplace more than normal. This will demonstrate that they are available and will support employees as required. Management commitment is essential for change to succeed and successful leaders will be the driving force behind the change process. They should be visible and accessible.

Senior management tend to overestimate employee loyalty in times of change

Corporate vision

Corporate vision will be diminished during periods of change, especially those involving a merger or take-over. A clear vision is needed at the beginning of the process to direct progress of change and to motivate employees. Establishing one clear corporate identity is essential. This can be reinforced by a new organisation mission statement. Producing the statement on laminated pocket-sized cards and distributing them to all employees will help to reinforce this and increase buy-in from them.

Communication

Communication is key in any project undertaken by an organisation either long or short term, but given the magnitude of change caused by a merger or take-over, it is imperative from the outset if the organisation is to succeed in both financial and people terms.

Communication should be regular, a combination of written and verbal, consistent and two-way. Types of effective communication could include cross-departmental project teams, open surgery question-and-answer sessions, team briefings, emails, notices and letters. The more information employees have, the less likely they will feel de-motivated (thus leaving the organisation unnecessarily).

Figure 1

Common problems facing organisations during change

The common problems of change are as follows.

- De-motivation among employees. This may be due to uncertainty regarding their future role within the organisation, lack of knowledge about the situation, an increase in 'rumours' circulating within the organisation or a general feeling of lacking self-worth emanating from the overall management of the process.
- An increase in absence levels either as a result of de-motivation and lack of interest in the job/organisation or due to stress-related illnesses.
- Increase in employee turnover, which can often lead to an organisation losing those employees it wants to retain and keeping those it doesn't. If employees are to be replaced, this could lead to increased recruitment costs or increased training costs through re-deploying employees into these roles.
- Decrease in productivity through higher absenteeism, de-motivation and concern among customers during the period of change.

Employee suggestion schemes are a good way of involving employees and making them feel that their views are being acknowledged. If one is currently in place, this should be re-marketed to employees to encourage their participation.

A timetable of events, as accurate as possible, should be distributed and discussed with all employees, helping to provide a focus both for the organisation and the employees. If any time scale is unlikely to be met, the reasons why should be communicated and a new timetable issued. However, the communication must be consistent in its format. All employees should have an equal opportunity to receive and give feedback, which should be conducted at the same time to prevent rumours and dissatisfaction in the ranks.

Culture

During a merger or take-over process, senior management must consider how the different cultures can be combined in a way that ensures a positive response from employees. Given that cultures can be diverse departmentally within an organisation, it will be even more difficult to combine cultures across different organisations with different histories, employee profiles and management styles.

Communication will help in this process, but it must be monitored to assess progress. A workable method of gaining an awareness and understanding of different cultures is to develop a programme of secondments across departments and across the organisations. This should not be limited to management-level employees; to be effective, it should be opened up to all employees and those who express an interest should be considered on an equal footing.

To be worthwhile, time will need to be spent on allocating mentors, devising objectives and planning the secondment carefully. As culture can take between three and ten years to change completely to a stage where all employees are committed, time invested at the start will have a positive impact in the later stages.

Training

Training is often, if not always, discarded during times of change rather than embraced, and as this is an excellent form of communication, it seems inappropriate to reduce or eliminate training provision across the organisation. While it can be expensive (and change often emanates as a need to cost-save), there are ways and means of ensuring that training is still a focus.

Training in times of change

Training is often viewed as a luxury by many organisations. It has many benefits, which range from it being a motivator for employees, both existing and potential, to building on the

organiational skills base to ensure competitiveness and adaptability to change. To this effect, one of the main errors made by organisations during mergers and take-overs is the elimination of training.

Employees immediately feel insecure when news hits them that their organisation is merging or being taken over, as there will inevitably be job losses – voluntary or otherwise. By incorporating training into the change process, employees feel valued and perceive that the organisation is continuing to invest in them and their future. The commitment from the company will engender commitment from the employees themselves.

Training is an extremely effective form of communication: it is two way, it incorporates verbal and written forms and it encourages two-way feedback. However, given the cost reduction mentality inherent in many change initiatives, training should, as in all cases, be relevant.

Internal training events will obviously be more cost effective than outsourcing if an internal training resource is currently employed.

The training originally planned prior to the change need not be retained. However, alternative training programmes can be developed to account for the change in the organisation's climate. In actual fact, the training plan, if one exists, should be reviewed to determine whether the training is still relevant to avoid the 'training for training's sake syndrome'. This would have a detrimental rather than positive effect. Types of formal off-the-job training recommended to enhance the change process could include those listed in *Figure 2*. These are just a few options to help ensure the change process is a success from all angles, not only from a senior management perspective. Training can assist in a number of ways, not least acting as a facilitator to change: it can increase communication, and develop relationships within the old and new organisation.

Summary

Any form of change affects individual morale and motivation, and an organisational merger or take-over is no exception. As highlighted, the negative effects of change can be minimised if managed correctly, and organisations should see the benefit of retaining training for all employees rather than reducing or eliminating it as is often the case during times of change.

Employee commitment is essential if change is to succeed – and communication is a key element in this process. It is important for the organisation to maintain momentum, and endeavour to adhere to any published promises and time scales to retain credibility among employees at all levels.

Communication is key. It is the vital tool to ensure the change process is a success, and should utilise a variety of methods to suit the organisational culture and the employees involved. A mission statement can be effective if written correctly and, in addition to one overall corporate identity, will help all employees to feel a part of the new style organisation. The amount of involvement employees have will affect the likelihood of them showing commitment to the change and the element of fear and uncertainty among them will be reduced.

Figure 2

Off-the-job-training to enhance the change process

- Customer care: to ensure the level of customer service remains a priority, this could be at an advanced or refresher level for employees.
- Stress management: to assist employees and managers alike to identify causes and signs of stress, and suitable methods of dealing with stress positively.
- Absence monitoring: for managers/supervisors to identify patterns in absences, and how to ensure they are monitored and problems areas addressed sooner rather than later.
- Communication: for all employees, although this will only be effective if the message on the training session is reinforced by what is actually happening organisation wide.
- Interview skills: for interviewers where existing employees have to re-apply for jobs or for external candidate interviews.
- Counselling skills: to provide managers/supervisors with the skills to enable them to support employees as required.
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Senior management have an important role to play and will be instrumental in the way the change is perceived among the organisation's workforce. Support from the top and an open, honest management style will reap rewards – as will commitment to training and development for all employees during the change process from the management team.

People fear change, particularly if there is a lack of communication

Change is essential in today's fast-moving, competitive market, but the effects can adversely affect an organisation's success and competitiveness if not dealt with correctly. Planning, communicating, training and involving will be the main factors in ensuring a smooth transition, and organisations should be prepared to take their time and set realistic aims for both themselves and their employees.

References

1. Industrial Society Survey *(September 1997)*
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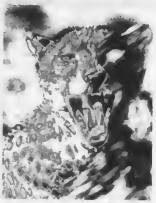

During times of change, senior management should be seen around the workplace more than normal. This will demonstrate that they are available and will support employees as required. Management commitment is essential for change to succeed and successful leaders will be the driving force behind the change process. They should be visible and accessible.

Senior management tend to overestimate employee loyalty in times of change

Corporate vision will be diminished during periods of change, especially those involving a merger or take-over. A clear vision is needed at the beginning of the process to direct progress of change and to motivate employees. Establishing one clear corporate identity is essential. This can be reinforced by a new organisation mission statement. Producing the statement on laminated pocket-sized cards and distributing them to all employees will help to reinforce this and increase buy-in from them.

Communication is key in any project undertaken by an organisation either long or short term, but given the magnitude of change caused by a merger or take-over, it is imperative from the outset if the organisation is to succeed in both financial and people terms.

Communication should be regular, a combination of written and verbal, consistent and two-way. Types of effective communication could include cross-departmental project teams, open surgery question-and-answer sessions, team briefings, emails, notices and letters. The more information employees have, the less likely they will feel de-motivated (thus leaving the organisation unnecessarily).

Figure 1

Common problems facing organisations during change

The common problems of change are as follows.

De-motivation among employees. This may be due to uncertainty regarding their future role within the organisation, lack of knowledge about the situation, an increase in 'rumours' circulating within the organisation or a general feeling of lacking self-worth emanating from the overall management of the process.

An increase in absence levels either as a result of de-motivation and lack of interest in the job/organisation or due to stress-related illnesses.

Increase in employee turnover, which can often lead to an organisation losing those employees it wants to retain and keeping those it doesn't. If employees are to be replaced, this could lead to increased recruitment costs or increased training costs through re-deploying employees into these roles.

Decrease in productivity through higher absenteeism, de-motivation and concern among customers during the period of change.

Employee suggestion schemes are a good way of involving employees and making them feel that their views are being acknowledged. If one is currently in place, this should be re-marketed to employees to encourage their participation.

A timetable of events, as accurate as possible, should be distributed and discussed with all employees, helping to provide a focus both for the organisation and the employees. If any time scale is unlikely to be met, the reasons why should be communicated and a new timetable issued. However, the communication must be consistent in its format. All employees should have an equal opportunity to receive and give feedback, which should be conducted at the same time to prevent rumours and dissatisfaction in the ranks.

During a merger or take-over process, senior management must consider how the different cultures can be combined in a way that ensures a positive response from employees. Given that cultures can be diverse departmentally within an organisation, it will be even more difficult to combine cultures across different organisations with different histories, employee profiles and management styles.

Communication will help in this process, but it must be monitored to assess progress. A workable method of gaining an awareness and understanding of different cultures is to develop a programme of secondments across departments and across the organisations. This should not be limited to management-level employees; to be effective, it should be opened up to all employees and those who express an interest should be considered on an equal footing.

To be worthwhile, time will need to be spent on allocating mentors, devising objectives and planning the secondment carefully. As culture can take between three and ten years to change completely to a stage where all employees are committed, time invested at the start will have a positive impact in the later stages.

Training is often, if not always, discarded during times of change rather than embraced, and as this is an excellent form of communication, it seems inappropriate to reduce or eliminate training provision across the organisation. While it can be expensive (and change often emanates as a need to cost-save), there are ways and means of ensuring that training is still a focus.

Training is often viewed as a luxury by many organisations. It has many benefits, which range from it being a motivator for employees, both existing and potential, to building on the

organisational skills base to ensure competitiveness and adaptability to change. To this effect, one of the main errors made by organisations during mergers and take-overs is the elimination of training.

Employees immediately feel insecure when news hits them that their organisation is merging or being taken over, as there will inevitably be job losses – voluntary or otherwise. By incorporating training into the change process, employees feel valued and perceive that the organisation is continuing to invest in them and their future. The commitment from the company will engender commitment from the employees themselves.

Training is an extremely effective form of communication: it is two way, it incorporates verbal and written forms and it encourages two-way feedback. However, given the cost reduction mentality inherent in many change initiatives, training should, as in all cases, be relevant.

Internal training events will obviously be more cost effective than outsourcing if an internal training resource is currently employed.

The training originally planned prior to the change need not be retained. However, alternative training programmes can be developed to account for the change in the organisation's climate. In actual fact, the training plan, if one exists, should be reviewed to determine whether the training is still relevant to avoid the 'training for training's sake syndrome'. This would have a detrimental rather than positive effect. Types of formal off-the-job training recommended to enhance the change process could include those listed in *Figure 2*. These are just a few options to help ensure the change process is a success from all angles, not only from a senior management perspective. Training can assist in a number of ways, not least acting as a facilitator to change, it can increase communication, and develop relationships within the old and new organisation.

Figure 2

Off-the-job-training to enhance the change process

- Customer care: to ensure the level of customer service remains a priority, this could be at an advanced or refresher level for employees.
- Stress management: to assist employees and managers alike to identify causes and signs of stress, and suitable methods of dealing with stress positively.
- Absence monitoring: for managers/supervisors to identify patterns in absences, and how to ensure they are monitored and problems areas addressed sooner rather than later.
- Communication: for all employees, although this will only be effective if the message on the training session is reinforced by what is actually happening organisation wide.
- Interview skills: for interviewers where existing employees have to re-apply for jobs or for external candidate interviews.
- Counselling skills: to provide managers/supervisors with the skills to enable them to support employees as required.
- Outplacement skills: to provide all employees with the opportunity to seek advice and guidance regarding all aspects of job hunting. It could be communicated to employees positively by stating they may need to apply for internal jobs or alternatively wish to develop their skills for the external market. The skills should include cv writing, interview techniques, writing covering letters and completing application forms.

Any form of change affects individual morale and motivation, and an organisational merger or take-over is no exception. As highlighted, the negative effects of change can be minimised if managed correctly, and organisations should see the benefit of retaining training for all employees rather than reducing or eliminating it as is often the case during times of change.

Employee commitment is essential if change is to succeed – and communication is a key element in this process. It is important for the organisation to maintain momentum, and endeavour to adhere to any published promises and time scales to retain credibility among employees at all levels.

Communication is key. It is the vital tool to ensure the change process is a success, and should utilise a variety of methods to suit the organisational culture and the employees involved. A mission statement can be effective if written correctly and, in addition to one overall corporate identity, will help all employees to feel a part of the new style organisation. The amount of involvement employees have will affect the likelihood of them showing commitment to the change and the element of fear and uncertainty among them will be reduced.

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will commitment to training and development for all employees during the change process from the management team.

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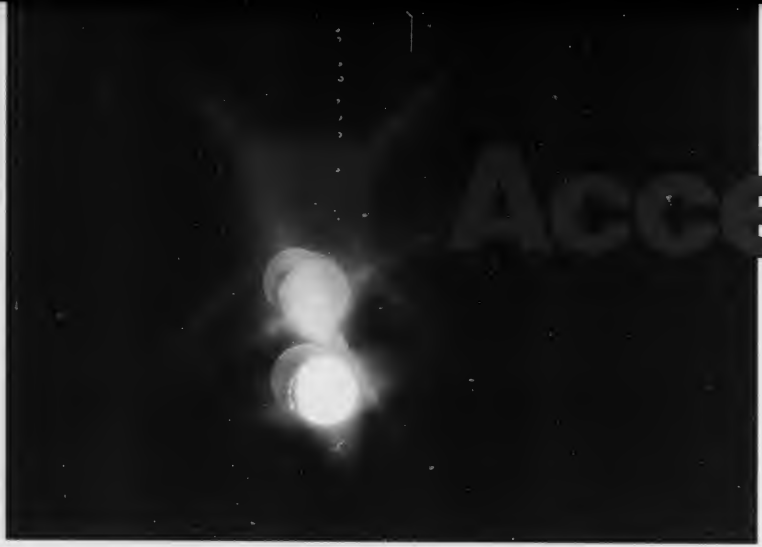

Why are trainers turning their backs on an approach to learning that has demonstrated outstanding results? **Larry Reynolds** admits that he's more than a little puzzled.

Imagine two training courses in a reasonably dull topic – say, financial awareness. The first course is very traditional. The trainer stands at the front, and lectures on the intricacies of the balance sheet and the profit and loss account. Trainees take notes and are given occasional exercises in constructing the documents. The atmosphere in the training room is heavy and slightly soporific.

The second course deals with exactly the same topic, but is organised very differently. The room is full of toys, flowers and posters, and there is music playing much of the time. The learners frequently move about. They learn about accounts by trading toy pigs, and building a physical representation of a balance sheet and profit and loss, which covers the carpet of the training room. Within a short time they are analysing real company accounts, then running their own company in a lively simulation. There is a lot of laughter, a lot of curiosity, a lot of fun, a lot of 'ah ha' moments.

Which of these two approaches provides the most learning? Intuitively, you might say the second, and you'd be right. This approach, often known as the accelerated learning method, enables people to learn faster – typically 30-50 per cent faster – and the learning sticks.

So if accelerated learning is so enjoyable for the learner and produces such terrific results, why isn't everyone doing it? One reason could be that trainers and people in the learning business are just not very open to new ideas.

Gaining acceptance

Imagine you used to live in an oil-lit household in the early part of the century. You read an article about Mr Edison's new invention – a method of lighting that is brighter, cheaper, more reliable. Your first reaction is probably: 'This is too good to be true!'

Closer to home, what if you heard of a revolutionary new vacuum cleaner? Would you rush out to buy it? As James Dyson discovered, it takes a long time for people to accept anything that is not simply a bit better, but a step-change improvement.

It was once said that every new idea goes through three stages – first it is ridiculed, then it is leading edge, then it becomes commonplace. Perhaps accelerated learning is still at the first stage?

If you reject the argument that people in the learning business are just not open to new ideas, then there is a second reason for the slow uptake of accelerated learning. It is simply this: accelerated learning is just too much bother.

Phil Badley, deputy head of a large community college in Cambridgeshire, is a big fan of

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elerator or brake?

accelerated learning. He has achieved significant results in his own area, which is the teaching of science, using accelerated learning techniques. His colleagues think that, in principle, it is a good idea. Yet it hasn't spread like wildfire throughout the school. Why?

A typical teacher's response is this: 'Phil, we just don't have the time. When we're delivering six different lessons a day to six different classes we just aren't able to organise the activities and the equipment needed to do accelerated learning. Nice idea, but not now.'

The teachers do have a point, I think. But trainers in the corporate world generally have much more time to prepare their courses. So are these trainers just lazy?

It's true that if you run a conventional training course you can pretty much turn up with a few flip chart pens and a PowerPoint presentation, and away you go. If you run an accelerated learning course you're looking at a boot, if not a van, full of equipment. And it does take more time to prepare because you are structuring the learning around the way the human brain learns best, rather than simply delivering the material the way you've always done. Maybe the key factor is 'botheration'.

Studying the advantages

Tempting though the above arguments are, most of the trainers I know are neither lazy nor narrow-minded. So why hasn't accelerated learning taken off? Could it be because people believe it doesn't actually work?

I was recently involved in a programme of financial awareness courses for some 1,700 people in a major utility company, using accelerated learning. We evaluated this at every level: reaction to the course; learning; change in behaviour; and bottom-line impact on the business.

Every aspect of evaluation was incredibly positive. As a result of attending the course, each participant was asked to identify a project that would add measurable value to the company. When the company itself evaluated these projects after just a year, the benefits totalled some £230,000.

The projects are continuing and many will bring in financial benefits year on year. For every pound invested in the training, the company receives back £1.50 – a return on investment of 50 per cent!

The results

There is a lot more to organisational learning than just training. But the principles of accelerated learning apply to any learning situation. Transformational change at Rotary Watches has been driven by a range of interventions including training, one-to-one coaching, continuous improvement teams and re-engineering projects – many based on accelerated learning principles. Managing director Robert Dreyfuss comments: 'This approach works because it doesn't stop at skills development; it fundamentally changes people's attitudes and beliefs.'

If accelerated learning is so enjoyable for the learner and produces such terrific results, why isn't everyone doing it?

So from my perspective, accelerated learning is a rip-roaring success. But maybe the success of these projects has nothing to do with accelerated learning. Maybe we're just good trainers and consultants, and these projects would have been just as successful if we'd taken a more conventional approach. Maybe. In my heart I find it difficult to believe.

This leaves me puzzled. Accelerated learning gives outstanding results, yet in this age of life-long learning and the learning company very few people seem to be doing it. In this article I've suggested a few reasons why this might be, but none of them really convinces me. If anyone can tell my why accelerated learning isn't taking the world by storm, I'd love to hear from them.

PDPs: can they inform training needs?

Chris Matthews looks at ways in which personnel development programmes can result in important benefits to participants' organisations.

The last 20 years have seen many changes in business methods and in the way organisations are managed. Increased competition in the market-place, mergers and acquisitions, outsourcing – all mean that jobs are no longer for life. As a result, there is increasing emphasis on individuals taking responsibility for their own development, recognising their own strengths and weaknesses, and taking control of their own futures through personal development plans (PDPs). In fact, there is an argument that says it will not be too long before employees are willing to pay to attend.

However, if we start with the premise that it is individuals within organisations that achieve good things rather than the organisations themselves, we can see that if individuals are developed and perform better, the organisation also benefits.

So just what are PDPs, and how effective are they? Usually run over three (sometimes five) days, a personal development programme should identify personal and career development needs, help individuals recognise their personal career derailment factors and, most importantly, enable them to implement a personal action and development plan.

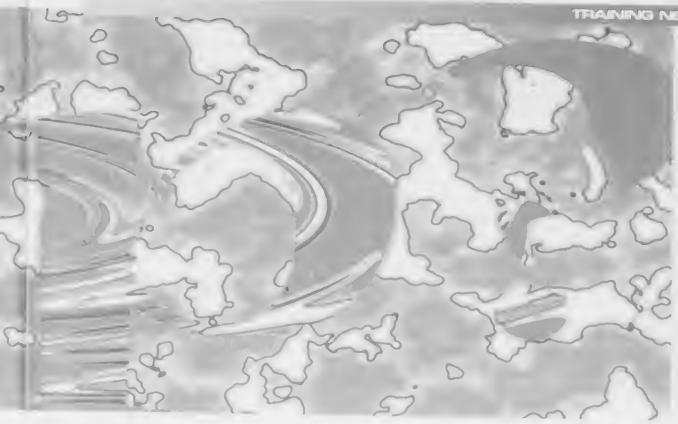
Chris Matthews has had a career almost entirely devoted to sales and marketing within service industries. Having spent some time in training development, he joined the attitudes, skills and knowledge development group ASK Europe plc in 1998 as director of sales and marketing. Over the last year he has concentrated on gaining market intelligence and an understanding of the requirements of HR departments in order to shape the group's development of new training programmes. Chris can be contacted at (tel) 01908 675050, (fax) 01908 675303 or (email) chris@askeurope.com

Ideally, management competency frameworks are used by independent observers, and psychometric instruments are used to assess individual participants' preferences. In addition, realistic simulations, group and individual exercises should examine and assess key behavioural competencies.

This means that participants should receive 360-degree structured feedback to provide information on how they are perceived by their superiors, colleagues and subordinates. Psychometric instruments such as Myers-Briggs, FIRO-B and the Thomas-Kilmann conflict mode instrument are often used to help provide a complete picture. This enables individuals to identify areas for development; then, working intensively on a one-to-one basis with a personal coach, they are able to assimilate personal feedback from all the sources and develop individual action plans.

All this can achieve many things. On an individual level, it will generate honesty, not only with individuals' peers but also with individuals themselves. It is very hard to delude oneself having been professionally assessed and having discussed plans with an occupational psychologist. Many people who have gone through the process feel that they understand themselves for the first time. They have a better understanding of what they are good at and why, and they are more aware of areas where they need to improve.

However, there would be very little point in employers sending their people to attend PDPs, if there was no benefit to the organisation as well. Perhaps the greatest value comes from people knowing how they are perceived by others. This has an impact on how well they work with people, the confidence they inspire in their superiors and



the ability they have to lead others.

In addition, a healthy, learning culture is encouraged and, by fostering an interest in the individual, the employer is active in helping employees with their career. Stature is further added to the organisation by the very existence of PDPs – a recognition that, particularly in service and knowledge-based businesses, the command and control philosophy does not work.

The instruments used in PDPs, such as 360-degree feedback questionnaires, can also impact on an organisation in a variety of ways. They can alter relationships, improve performance, create more open communication, impact on management style, change the roles of affected parties, and alter peoples' attitudes to performance. Most importantly, they let participants see themselves as others see them, giving them valuable insight, and thereby enabling them to understand their own training needs. Delegates may then wish to discuss some of the outcomes on their return.

Aggregate data on training needs can also be gathered to assist with planning and delivering targeted training programmes in the future, and skills, experience and potential will be mapped across the organisation which will help in succession, strategic and resource planning. Identifying individual learning styles can also help build more effective 'learning organisations'.

Organisations trying to understand the strengths and weaknesses of their managerial population – and therefore gain an insight into training needs, as well as skills experience and potential which can help in succession and strategic planning – also often use aggregated trend data.

Trend data can be derived from samples of ten or more participants. Items – such as understanding of the business, ability to be discreet and willingness to share views – can be scored 'positively', 'areas for improvement', 'not relevant' or 'don't know'.

Personal enlightenment can be one step towards the organisation as a whole becoming more effective

But care needs to be taken in checking whether these aggregated needs are the same as the strategic development needs of the business. If the outcomes of a PDP are fed into some form of organisational review and succession plan, there needs to be a consistency in the way the skill sets that an organisation requires, and those that feature on a personal development plan, are described.

Understanding success

There is a responsibility on the part of the organisation, the individual participating in the PDP and the training provider to ensure that there is a common understanding of what 'success' within an organisation means. Do terms such as 'leadership' convey similar images across each of these parties? If not, then there will be the inevitable pain of translation when individuals return to their jobs with models in mind that seem at odds with the reality around them.

If this important groundwork can be undertaken then the personal development plans of returning delegates can immediately begin to germinate. It is important, however, to clarify the objectives of personal development and the use of 360-degree feedback. If there has been a corporate decision to use the process to improve communication or to identify training and development needs, then the organisation tends to be more ➤

open with voluntary processes where, while the data from 360-degree feedback may belong to the individual, it will form part of a wider development plan.

A corporate training needs objective will influence how the feedback is used – whether it should be administered in-house or by external providers, which department or area should take responsibility for 360-degree feedback, the design of the questionnaire and the frequency with which 360-degree feedback is repeated.

A decision also needs to be taken on how widely 360-degree feedback will be used within an organisation. Additionally, from the outset, the method of evaluating whether the objective has been met needs to be determined.

Evaluation

Clearly linking 360-degree feedback to improvements in organisational performance is sometimes difficult, but areas that can be evaluated include repeating 360-degree feedback surveys to monitor progress. This can assess the degree of shift in ratings between surveys for groups of employees and indicate whether any significant changes in behaviour have taken place. Looking up group data does not affect individual confidentiality.

Staff attitude surveys with questions that relate to the areas rated in the 360-degree feedback questionnaire provide another way of measuring whether people observe any change. For example, questions might focus on whether communication has increased within the organisation, whether teams are working more effectively, or whether staff feel empowered.

There is no greater benefit to an organisation than a performance culture

Key performance indicators should also be monitored to determine whether targets have been met more closely following the introduction of 360-degree feedback and customers may be surveyed to identify whether they perceive any improvements in service.

It is also important that PDPs are followed-up with the participants themselves in order to monitor the individual's progress.

Interestingly, the majority of the 'successes' are directly related to some form of organisational success, such as the achievement of objectives or improved teamwork, rather than something entirely personal. These people judge their success by the same measure that the organisation uses – they do not perceive their personal success in a vacuum.

Should this surprise us? To suggest that individuals will measure success only in narrow personal terms is surely a throwback to the now discredited scientific management theory – and PDPs stress the point even more that it is people who deliver results. As the recent excitement over Daniel Goleman's books on Emotional Intelligence[1] demonstrates, people skills are big on current development strategies, and personal enlightenment can be one step towards the organisation as a whole becoming more effective.

What might be uncomfortable for the training and development specialist within an organisation is the acknowledgement that PDPs might not fit neatly into an orthodox training needs analysis.

Results

While 360-degree feedback will provide such expected results as the identification of areas for development and an individual's strengths, the outcomes can be unpredictable with unexpected results possibly including the identification of discrepancies between an individual's perception of performance and the perception of others.

The content of PDPs may therefore be difficult to match against a neat set of well-defined organisational competencies. And yet it is this that can make them so powerful because they focus on the full complexity of the person.

Professionally run development programmes make individuals more aware of who they are and where they are going. They make them want to improve; they give them direction and they help them plan.

When individuals have this, they are in a position to take control. Self-managed learning becomes a reality and employees generate a performance culture that performance management on its own might not do. There is no greater benefit to an organisation than a performance culture. As Goleman says: 'In the end you deliver solutions through people.'

Reference

1. *Goleman, D*, 1999 *Working With Emotional Intelligence*; 1996 *Emotional Intelligence, Why It Can Matter More Than IQ*. (Bloomsbury, London.)

For an extensive interview with Daniel Goleman on the subject of Emotional Intelligence, please refer to the July 1999 issue of *Training Journal*. Copies available from the editor on request.

Brian Tucker reviews

Brian Tucker is company secretary and co-ordinator for the Forum for Technology in Training, and a technology-based training consultant
He may be contacted at (tel) 0151 342 8606

Writing Effective English

Dean Associates, 9 The South West Centre, Troutbeck Road, Sheffield S7 2QA
Tel: 0114 258 1171

CD-ROM

This course is a straight CBT with text and graphics. The structure is simple and practical, allowing freedom to learn topics in the order you wish, while dealing with modules in a logical sequence. This will benefit people with different learning styles.

This CBT course is designed to teach writing effective English, and audio and video would not add anything to the learning, so it has not been used. The style is consistent, effective and appropriate. All instructional screens depict a spiral bound book. The navigation is intuitive and consistent and is explained in the Help pages for anyone needing more clarification. You always know where you are in the course and module and the book marking is effective. The course involves the learner most of the time, in thought as well as in responding to the questions. The feedback is positive and gives explanations where the learner makes mistakes. The course uses a variety of interactions, which are all appropriate to the questions.

The content is appropriate to the target audience, factual and current. It deals with modern writing styles and use of punctuation. It is split into two main modules: The English Sentence, and Effective English for Business Letters. The first examines the parts that make up a grammatical sentence, with lots of practical examples. The second module introduces many aspects of business letter writing, although it does explain that the learning points relate equally to all other forms of writing. The learning objectives are appropriate to both the target audience and the subject matter and are achievable. There is a workbook that can be printed from the CD-ROM if it is required and the opportunity to print off aide memoir's is given at the end of each topic.

Technical specification

Minimum specification:
- 486 66 Mhz processor or higher
- Windows 3.1 or higher
- Mouse
- 8 Mb RAM (16 Mb or higher recommended)
- VGA or better monitor capable of displaying 256 colours with a minimum resolution 640 x 480 pixels
- 12 Mb free hard disk space
- CD-ROM drive for installation

A Pentium processor 200 Mhz PC with 32 Mb RAM and Windows 95 is, however, recommended.
A printer is needed to print the workbook.

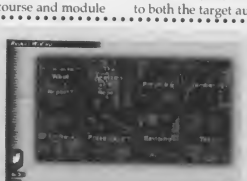
Cost

Unit price £99 + VAT; five-user licence £435+VAT.

Ratings:	
Instructional design	★★★★
User interface	★★★★
Interaction	★★★★★
Content	★★★★★
Overall	★★★★

Report Writing

Maxim Training, 42 Bond Street, Brighton, East Sussex BN1 1RD
Tel: 01273 827 777



CD-ROM with Work Book

This is a multi media course, using text graphics, sound and video. The sound, I am pleased to say, is in addition to and not repeating the text. Video is used for scenarios to enhance the key learning points, and is not overdone. The structure of the course is logical, but allows the learner to skip sections if they wish. In fact, for those who have already studied their Effective Writing course, there is a button giving learners the facility to skip some parts of the course.

The style is consistent throughout and is easy to follow. Anyone not having used a Maxim course before can look at the tutorial. However, the navigation is easy to use and is constant all through the course, but has the addition of a outton allowing you to skip all or part of some modules, if you are familiar with the topic.

The course is thought provoking and therefore involves the learner. There is plenty of other interaction using a variety of questioning techniques. I found the course kept my attention and was enjoyable to undertake. The feedback was good, particularly when I got things wrong. It dealt with my deliberate mistakes, by explaining that it didn't fit with their answer, and explained the reasons in a non-patronising manner.

The content was well presented and covered all aspects of report writing from Terms of Reference through Preparation, Structure, Report Etiquette, Drafting, Style, Presentation, to Editing and Revising. The content is appropriate for anyone wanting to learn how to write reports or anyone wishing to improve their skills. The benefits of learning are presented, as are the objectives, which are achievable. It needs to be followed up with practical experience to achieve complete learning.

The work book summarises the information, helps the learner to analyse their own writing and allows for note taking. It also contains a useful checklist for measuring the effectiveness of the finished report.

Technical specification

Minimum specification:
* 5X/25 with 4 Mb RAM 66 Mhz processor or higher
* Windows 3.1 or higher
* Mouse
* SVGA graphics card, 640 x 480 x 256
* 16 bit sound card
* 12 Mb free hard disk space
* Double speed CD-ROM drive

Cost

The unit price is £820 + VAT. **BT**

Ratings:	
Instructional design	★★★★
User interface	★★★★★
Interaction	★★★★
Content	★★★★★
Overall	★★★★

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It is also important that PDPs are followed-up with the participants themselves in order to monitor the individual's progress.

Interestingly, the majority of the 'successes' are directly related to some form of organisational success, such as the achievement of objectives or improved teamwork, rather than something entirely personal. These people judge their success by the same measure that the organisation uses - they do not perceive their personal success in a vacuum.

Should this surprise us? To suggest that individuals will measure success only in narrow personal terms is surely a throwback to the now discredited scientific management theory – and PDPs stress the point even more that it is people who deliver results. As the recent excitement over Daniel Goleman's books on Emotional Intelligence demonstrates, people skills are big on current development strategies, and personal enlightenment can be one step towards the organisation as a whole becoming more effective.

What might be uncomfortable for the training and development specialist within an organisation is the acknowledgement that PDPs might not fit neatly into an orthodox training needs analysis.

While 360-degree feedback will provide such expected results as the identification of areas for development and an individual's strengths, the outcomes can be unpredictable with unexpected results possibly including the identification of discrepancies between an individual's perception of performance and the perception of others.

The content of PDPs may therefore be difficult to match against a neat set of well-defined organisational competencies. And yet it is this that can make them so powerful because they focus on the full complexity of the person.

Professionally run development programmes make individuals more aware of who they are and where they are going. They make them want to improve; they give them direction and they help them plan.

When individuals have this, they are in a position to take control. Self-managed learning becomes a reality and employees generate a performance culture that performance management on its own might not do. There is no greater benefit to an organisation than a performance culture. As Goleman says: 'In the end you deliver solutions through people.'

Reference

1. Goleman, D, 1999 *Working With Emotional Intelligence*; 1996 *Emotional Intelligence: Why It Can Matter More Than IQ*. (Bloomsbury, London.)

For an extensive interview with Daniel Goleman on the subject of Emotional Intelligence, please refer to the July 1999 issue of *Training Journal*. Copies available from the editor on request.

Brian Tucker reviews

Brian Tucker

Writing Effective English

Dean Associates, 9 The South West Centre Trowbeck Road, Sheffield S7 2QA
Tel: 0114 258 1171

CD-ROM

This course is a straight CBT with text and graphics. The structure is simple and practical, allowing freedom to learn topics in the order you wish, while dealing with modules in a logical sequence. This will benefit people with different learning styles.

This CBT course is designed to teach writing effective English, and audio and video would not add anything to the learning, so it has not been used. The style is consistent, effective and appropriate. All instructional screens depict a spiral bound book. The navigation is intuitive and consistent and is explained in the Help pages for anyone needing more clarification. You always know where you are in the course and module and the book marking is effective. The course involves the learner most of the time, in thought as well as in responding to the questions. The feedback is positive and gives explanations where the learner makes mistakes. The course uses a variety of interactions, which are all appropriate to the questions.

The content is appropriate to the target audience, factual and current. It deals with modern writing styles and use of punctuation. It is split into two main modules: The English Sentence, and Effective English for Business Letters. The first examines the parts that make up a grammatical sentence, with lots of practical examples. The second module introduces many aspects of business letter writing, although it does explain that the learning points relate equally to all other forms of writing. The learning objectives are appropriate to both the target audience and the subject matter and are achievable. There is a workbook that can be printed from the CD-ROM if it is required and the opportunity to print off aide memoir's is given at the end of each topic.

Technical specification

Minimum specification
- 486 66 Mhz processor or higher
- Windows 3.1 or higher
- Mouse
- 8 Mb RAM (16 Mb or higher recommended)
- VGA or better monitor capable of displaying 256 colours with a minimum resolution 640 x 480 pixels
- 12 Mb free hard disk space
- CD-ROM drive for installation

A Pentium processor 200 Mhz PC with 32 Mb RAM and Windows 95 is, however, recommended.
A printer is needed to print the workbook.

Cost

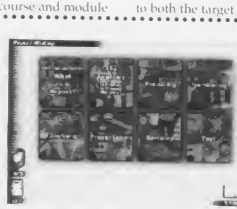
Unit price £90 + VAT five user licence £435+VAT

Ratings:

Instructional design	****
User interface	****
Interaction	*****
Content	*****
Overall	****

Report Writing

Maxim Training, 42 Bond Street, Brighton, East Sussex BN1 1RD
Tel: 01273 827 777



CD-ROM with Work Book

This is a multi media course, using text graphics, sound and video. The sound, I am pleased to say, is in addition to and not repeating the text. Video is used for scenarios to enhance the key learning points, and is not overdone. The structure of the course is logical, but allows the learner to skip sections if they wish. In fact, for those who have already studied their Effective Writing course, there is a button giving learners the facility to skip some parts of the course.

The style is consistent throughout and is easy to follow. Anyone not having used a Maxim course before can look at the tutorial. However, the navigation is easy to use and is constant all through the course, but has the addition of a button allowing you to skip all or part of some modules, if you are familiar with the topic.

The course is thought provoking and therefore involves the learner. There is plenty of other interaction using a variety of questioning techniques. I found the course kept my attention and was enjoyable to undertake. The feedback was good, particularly when I got things wrong. It dealt with my deliberate mistakes, by explaining that it didn't fit with their answer, and explained the reasons in a non-patronising manner.

The content was well presented and covered all aspects of report writing from Terms of Reference through Preparation, Structure, Report Etiquette, Drafting, Style, Presentation, to Editing and Revising. The content is appropriate for anyone wanting to learn how to write reports or anyone wishing to improve their skills. The benefits of learning are presented, as are the objectives, which are achievable. It needs to be followed up with practical experience to achieve complete learning.

The work book summarises the information, helps the learner to analyse their own writing and allows for note taking. It also contains a useful checklist for measuring the effectiveness of the finished report.

Technical specification

Minimum specification:
* SX 25 with 4 Mb RAM 66 Mhz processor or higher
* Windows 3.1 or higher
* Mouse
* SVGA graphics card, 640 x 480 x 256
* 16 bit sound card
* 12 Mb free hard disk space
* Double-speed CD-ROM drive

Cost

The unit price is £820 + VAT BT

Ratings:

Instructional design	****
User interface	*****
Interaction	****
Content	*****
Overall	****

John Eary is managing consultant, NCC Skills Source, National Computing Centre Ltd. He specialises in innovative uses of training technology such as the PC Driving Test, and developed networked multimedia applications, which have won the European Training Technology Award and four national awards for innovation and effectiveness. He can be contacted at National Computing Centre (tel) 0161 242 2141 or (email) john.eary@ncc.co.uk

Assessing the effectiveness of **web-based training**

Proponents of the latest manifestation of training technology are making many claims for WBT. **John Eary** measures its success against a range of other options.

Web-based training would seem to have many advantages. It's available when and where it is needed. It results in reductions in training time and costs. On top of that, there's a high retention. However, a myth has arisen already that only web-based training can deliver these benefits. But many of these benefits are also shared by open learning.

Open learning: a history

Open learning started with correspondence courses and teaching machines as alternatives to the formal lecture. In the 1970s computer-assisted learning (CAL), where a computer was used to deliver the training, arrived. Computer-managed learning (CML), where the computer is used to monitor and manage the trainee's progress, and which has recently been rediscovered, dates back to this time. The combination of CAL and CML became known as computer-based training (CBT).

The 1980s saw an explosion in CBT with the increasing availability of the ubiquitous PC. DTP helped to establish paper-based distance learning. Interactive audio, CBT plus sound, occupied a brief interlude before being superseded. However, much modern-day multimedia courseware is essentially interactive audio, consisting of little more than stills and text plus sound.

Interactive video was the first analogue-based attempt at multimedia containing moving video. However, the need for cumbersome equipment meant it never really took off.

Multimedia-based training containing all five elements that are digitally based became established early in this decade. Computer-based simulations have become an increasingly sophisticated learning tool. And now we have reached the era of web-based training (WBT).

But open learning is only one of many methods of learning. There is a spectrum of learning methods – from lectures and tutorials to the use of experiments, drill and practice exercises, and group working – that have proved effective in learning and these new technologies can be employed for all these methods.

Similarly, WBT is only one of a range of technologies that includes CD-ROM, multimedia, computer and video conferencing, cable and satellite, virtual reality and digital TV that we can employ. So WBT must be judged against a whole range of alternative technologies and training methods (see *Figure 1*).

A further myth is that WBT delivers business benefits. But as in any training method it only enables them. So where does the decision to use WBT fit in to the scheme of things? There will be a range of different business drivers ranging from economic, government regulation or management initiatives.

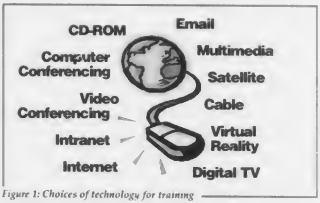


Figure 1: Choices of technology for training

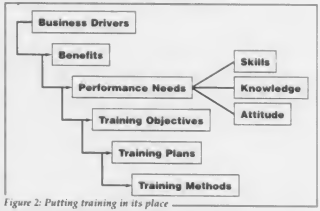


Figure 2: Putting training in its place

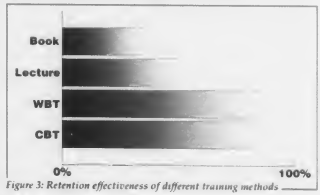


Figure 3: Retention effectiveness of different training methods

Training is only a means to an end, which is to obtain some business benefits for the organisation. These benefits may be, for example, to reduce costs or increase

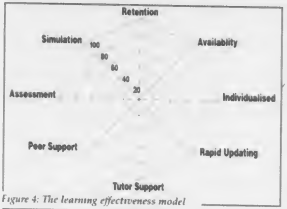


Figure 4: The learning effectiveness model

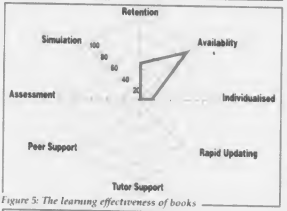


Figure 5: The learning effectiveness of books

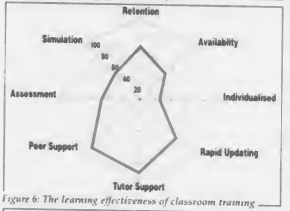


Figure 6: The learning effectiveness of classroom training

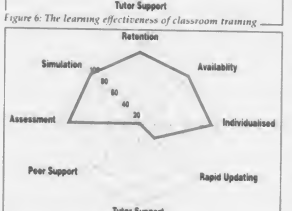


Figure 7: The learning effectiveness of computer-based training

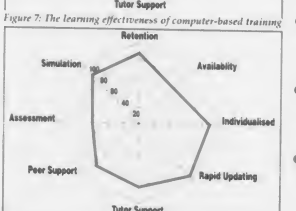


Figure 8: The learning effectiveness of web-based training

market share through better service. To realise these benefits it is necessary to improve performance and this will identify performance needs that may require an improvement in skills, knowledge and attitude.

From these performance needs it will be possible to set training objectives in the classical way and develop training plans for groups and individuals. It is only now that we need to consider the most appropriate training method and this decision will depend on cost and effectiveness (see *Figure 2*).

Training is only a means to an end, which is to obtain some business benefits for the organisation

Measuring effectiveness

There is a wide range of parameters that can be used to measure the effectiveness of any one training method. Eight of these are suggested below.

- Retention: how well will the trainee remember the essential elements of the material?
- Availability: can trainees have access whenever and wherever they require training?
- Tailorable to individual: will the course adapt to the requirements and the existing knowledge of the trainee?
- Ease of updating: can the material be quickly revised to reflect changes in the training requirements or the subject on which it is based – for example, changes in procedures or legislation?
- Facilities for tutor support: can the trainees have access to a tutor when they require their help?
- Facilities for peer support: can trainees work together to share experience and provide mutual support?
- Facilities for assessment: is it possible to test trainees to ensure they have reached the required level of competence?
- Able to simulate processes: simulation is proven to be an effective way to train where the real situation would be difficult to create or would expose trainees to health and safety risks.

Using these measures it is possible to construct an effectiveness scale. *Figure 3*, for example, considers the retention parameter. On average we can expect to remember about a quarter of the material on first reading of a book. If we attend a lecture, where the lecturer can give emphasis to particular points and the general live experience, we might hope to retain half of the learning points. WBT and CBT, being more interactive and involving, have been shown to provide higher retention rates at 70 per cent or better.

Another measure of effectiveness is availability – that is, how readily accessible the learning method is. A book is very accessible. We can read it almost anywhere. A classroom-based lecture is much less accessible. We have to be in the same place and at the same time as the lecturer.

WBT is more accessible. We can choose the time and the place, but we have to be connected to the Internet or intranet - still difficult to do at home if you do not have access or if other members of the family are using the telephone. CBT really scores well here, compared to WBT, as all we need is access to our PC. It is possible to use a PC on the train but not possible with WBT even with a digital phone connection.

If we are to consider as many as eight measures of effectiveness for a variety of learning methods, then a systematic representation is needed. We can place all eight measures on a spider diagram where the maximum values of the effectiveness scale are at the edges of the diagram (see *Figure 4*).

So how do training methods rate with this approach? As we can see from *Figure 5*, a book rates highly on its availability but less so on retention. It scores nothing for the other measures and can only be considered as individualised by selective reading by the reader.

Figure 6 shows that classroom training has reasonable scores for retention and availability but has limited effectiveness for assessment, simulation or individualised learning. However, it scores well for peer and tutor support, and can be rapidly changed by the lecturer. ➤

➤ As highlighted in *Figure 7*, CBT scores well for retention and availability, and also for assessment, simulation and individualised learning. Updating material probably means issuing new CD-ROMs and is thus not given a high score. Unless added in especially, the basic CBT model does not allow for peer or tutor support, as it is essentially a self-study method.

WBT (see *Figure 8*) scores similarly to CBT although it is less available and there can be some problems in assessment through impersonation. However, it is also better than CBT in that it offers both tutor and peer support as email and conferencing facilities can be readily provided.

These figures show a generalised approach. However, when applied by NCC to an individual organisation, criteria are devised for effectiveness that are specific to that organisation.

Counting the costs

Cost is always an important consideration for any training method. All training methods have three main elements in common.

First, there is the cost of creating content. This may take the form of the cost of purchasing materials, or commissioning costs of new material to be developed by a third party or the cost of developing them in-house.

Second, delivery costs relate to equipment, premises, other facilities, the replication of training materials in the chosen medium (for example, paper and CD-ROM), the time of the instructor, facilitator or tutor, and costs including the opportunity costs of the trainees, their travel and accommodation where these are incurred.

Finally, there's maintenance – the ongoing cost of maintaining and amending the course during the period of its use.

NCC has a long-established computer-based cost model, CATO (Cost Assessment of Training Options), which it has adapted for the newer learning technologies. Traditional training methods tend to be cheaper to develop but more expensive to deliver than technology-based methods where savings in travel and accommodation, as well as tutors' and trainees' time, can be achieved.

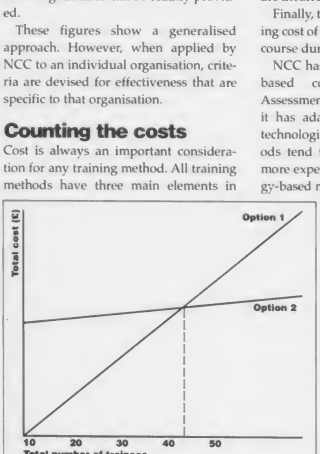


Figure 9: Break even analysis

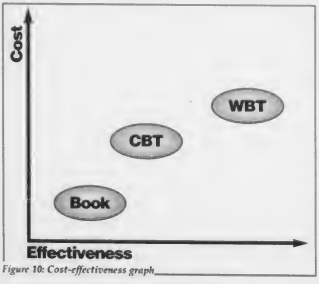


Figure 10: Cost-effectiveness graph

Apart from identifying individual costs there are other factors that the model takes into account, including shelf life, the availability and location of trainers and trainees, the amount of tailoring required, and the number of people to be trained.

Course development ratios – that is, the number of hours' preparation required for a course element that takes the average student one hour to complete – are also important. The ratio can be as high as 200:1 (in other words, 200 hours of preparation for one hour of instruction).

The result of these calculations is a break-even analysis where one training method becomes more economic in terms of its total costs compared to another. For example, WBT has higher development costs than classroom training but has lower delivery costs and, in *Figure 9*, where there are more than 46 trainees the total costs of WBT are less than those of classroom training.

This is a straightforward comparison between two options. However, where there are many training options to be considered, it requires a computer model such as CATO to carry out a thorough evaluation of the choices available.

It is now possible to combine the costs of each method with its effectiveness scores. We can plot costs against effectiveness, which generates a pattern such as that shown in the cost-effectiveness graph (see *Figure 10*). It should be stressed again that this a generalised approach. The actual costs and scores will depend on the circumstances and requirements of your organisation.

The third myth is that the training method is the overriding consideration. There are obviously good and bad materials in all media. So the quality of the training material must be given serious consideration. There are many aspects of quality that apply to many training methods.

The overall instructional design is important. For example, are the navigation paths clear and consistent, and related to the content? Do users feel in control by the ability to make real choices that are relevant? Is there a high level of interactivity that will involve users and aid their retention? Is the use of language appropriate to the audience and the subject matter?

It is encouraging that some of these aspects are reflected in the University for Industry's proposed criteria for computer-based learning materials.

Screen design can make a significant impact on compression, and the different format of the web as opposed to paper-based training materials is not always appreciated. The 'treatment', a term derived for the video industry, is becoming increasingly important as multimedia elements are incorporated into WBT materials. The appropriate use of sound, stills and moving images distinguishes professional level applications. When all these elements are combined appropriately they can result in training that is motivating for the learner.

So, in conclusion, there are very many options. There are very many considerations. But by careful analysis, it is possible to maximise effectiveness for a given situation by choosing the best training horse for the course.

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Clare Forrest would be pleased to know by snail-mail, email or carrier pigeon the URLs of any sites that you have enjoyed, loathed or just find plain indispensable so that she can bring them to everyone's attention. She can be contacted at (email) Cforrest@bigfoot.com

Netcheck

Clare Forrest offers some valuable advice on using the Internet for research, and shows how to use often-neglected search techniques to obtain the information you need quickly and efficiently.

Trying to find your way around the Net can be very irritating. There's so much out there that locating what you want can be very, very time – and cash – consuming. Judging from some of the requests that appear on UKHRD and TRDEV-L, many trainers don't bother to go through the pain of carrying out their own searches. While I can scarcely blame them for taking shortcuts via asking colleagues on the lists, it is a shame in my view, for three reasons.

1. Research skills are rapidly becoming the fourth of the three Rs and we all need to take every opportunity to improve. None of us can possibly hope to hold all there is to know in our heads, but we ought to know how to find what is available on a given topic area quickly and easily. Regularly using the Net to carry out searches – and using a number of different search engines and strategies – is an excellent way of learning how to use this wonderful resource more productively.

2. So often trainers receive either conflicting or no information to their posted queries. Anyone who followed the recent Mehrabian thread on TRDEV-L (he's the researcher whose statistics you see quoted everywhere – the 55 per cent non-verbal, 38 per cent tone and 7 per cent verbal elements which, supposedly, make up communication), may well have been flummoxed by the many and varied responses received on this one. Such experiences are typical of listservs. It's not that listers are being deliberately misleading – far from it; many are intending to be very helpful. It's simply that we trainers are rather good at garnering information from all four corners of the earth, but without necessarily checking its validity, then using it to suit our particular learning purposes. I know; I've done it myself. The Net, like any other research resource – books, magazines, papers, libraries and so on – is full of selective sources and quotes. People will always tell you that it's full of rubbish. And so it is. But then, so is any library or bookshop, or even academic institute. Where the Net scores is that it does provide a mass of material from a multitude of sources, which the experienced user can quickly sift through to obtain balance. And, more often than not, you can actually get to a website set up by a particular guru or research institute and obtain your information, so to speak, straight from the horse's mouth.

3. I think we all need to use the Net more often for research because it's fun. Having said that, friends have been known to look at me a little sadly when I talk about its virtues. But honestly, where else can you find yourself moving from topic to topic and link to link, spreading through literally the whole world and touching on the views, experiences and opinions of some of our most senior businesses and people

www.google.com

in a 5-minute session? I rest my case. So what about the reality? I decided to carry out a search on a current hot topic – the retention of key employees – and to use the popular search engine Google at www.google.com

Google loads with a wonderfully simple page: you get the Google logo, a box to input your search query and two search buttons – one for a general search and one headed 'I'm feeling lucky'. That's about it. This clean interface does assume that the searcher is familiar with completing text boxes, which could be a little too sparse for a new user. For those who like to use a search engine that also carries lots of interesting links and advertising, Google is not for you.

Not daunted, I simply typed in: How do I retain key employees?, hit the search button and in 1.72 seconds (Google always tells you how long it has taken to search) the following appeared.

At least 14,994 matches for 'How do I retain key employees?'

'How' is a very common word and was ignored. ➤

➤ *'I' is a very common word and was ignored. Showing results 1-10 ...*

At this point it is entirely likely that, for the new user, the heart sinks. 'All those matches! What on earth do I do next?'

To begin with, you could simply start looking through the citations, because it is important to know, generally, those that most nearly match your query come first. Entries, incidentally, are usually known as hits. So, there's every chance that after the first 30 or so hits you will have trawled through the most significant ones. It's no harder than glancing along a shelf of library books really.

Your best plan is to download the Google pages you want to investigate – say, five or so – disconnect the line, then browse through them at your leisure. Take notes of the ones you want to investigate and bookmark them. Then you can reconnect and visit the site links.

Given that there are so many, though, a better plan is to refine your search. Google is unhelpful in this respect; it relies on the user knowing something about searching, because the only time you get information given to you is when you've done something wrong.

You could hit the 'I'm feeling lucky' button, which takes you directly to a site that Google chooses but, given that you know there are so many entries, this is probably unwise. (Use 'I'm feeling lucky' only when you are reasonably sure of where you want to go but haven't got the full address – a named company site for example.)

In fact, if you've not used Google before, hitting the text 'more Google' takes you to its useful and plainly written help pages. But how many of us actually bother to read the instructions for anything?

Try this instead. Surround your text in double quote marks – you might as well delete the words 'How do I', since Google has already said it is ignoring these – so that you are left with "retain key employees". Hit search again and bingo. Now you're down to a much more manageable 127 hits and can download the pages that interest you – ten will be more than enough – and start browsing.

Google hits are particularly easy to scan. Text in red is the heading and black text is a short abstract from the text, which is infinitely better than many search engines that provide only a title and an address. Even more usefully, the text abstracted contains your search words, and your key words are emboldened so that you can easily see them.

Green text is the site address. The blue Cached (12k) is particularly useful as it means you can call up a copy of the page very quickly to see if it is useful or not. Do bear in mind, though, that the cached copy may be quite old. However, this also means that the cached copy might actually be more useful than its newer version, which may have changed substantially since it was indexed.

The first link I tried was broken. But don't worry if this happens. If you really want to source that particular link, try the cached copy first. If there isn't one or if it isn't full enough, then try deleting the address line to the first back slash and see if that works. More often than not it will, but if it doesn't try a search using a key word – preferably a name – from the link you have.

Here are two examples:

BellSouth Small Business Services
... further. Rewarding and Retaining Key Employees Detailed ...
... Compensation: Attracting and Retaining Key Employees How to ...
www.smlbiz.bellsouth.com/archives/97.6.30.html Cached (12k)

Keeping the Best: A Practical Guide to Retaining Key Employees
...Practical Guide to Retaining Key Employees Bevan S, Barber...
...their best and most valuable employees. Rather than panic and throw money...
www.employment-studies.co.uk/pubs/337.html Cached (12k)

The two examples above were the next ones I decided to follow; the first because it covered reward and retention, and seemed to be small-business based; the second because it called itself a practical guide and was UK based.

It's important to have some sense of what you want to know about your topic before you start, otherwise it is easy to spend an eternity searching. Following names that you recognise is usually helpful, as is knowing if you want information specific to a particular country. Many searches can be greatly improved by just adding 'UK' or 'British' into your search string.

The BellSouth link was excellent and had a number of directly useful links to other sites. I chose .. link headed 'When money isn't enough', which took me to www.forbes.com/forbes/111896/5812164a.htm

Gold dust: a lengthy article, quickly downloaded, with a number of case studies, which could be easily followed up by emailing the companies concerned. Before leaving I also tried the site's own search engine and found one other article with information and illustrations about stock options at www.forbes.com/forbes/99/0517/6310210a.htm

It you have found a site useful, always check its full resources before you leave. Chances are there will be other material there for you to mine.

www.employment-studies.co.uk/pubs/337.html was simply a reference to a book – valuable for future reference or something you could order on-line.

One more link from Google that is worth investigating is www.i2m.org/PricewaterhouseCoopersCafe/LS_99jan.html

So, lots of success with Google. In less than 20 minutes I had a total of seven articles and a detailed checklist downloaded ready to read in detail – all with follow-up references if needed. I also had some useful addresses, and knew the names of several companies who had tackled the problem and who could be contacted for more information.

Google does not support all of the operations found in all search engines – 'or' searching for example. Apparently it plans to support these in a future release – which might or might not be helpful. The great thing about Google is its simplicity. You don't have to try very hard or know much about complex searching operations to end up with truly valuable hits.

To my mind Google is definitely the best search engine for those who value simplicity and speed. And it Google can't help, you can quickly access other major search engines from it. Try it for yourself. ***CF***

www.google.com

content (if you know what you're looking for)	★★★★★
originality	★★★★★
navigability	★★★★
presentation and graphics	★★★★★
downloads and freebies	★
links	★★★★★

UK-HRD snippets

1,000 and rising

UK-HRD is an email-based discussion forum managed by *Training Journal*. It is totally free to join. The very first message was posted to UK-HRD on 18 May, 1998. A little more than one year later, on 20 July 1999 to be precise, the 1,000th member joined the forum and in celebration of this landmark was given a free subscription to *Training Journal*. For details on joining UK-HRD, see the advertisement on the back page or point your browser to www.ukhrd.com

This month, we follow a discussion thread started by Beverley Williams that eventually led to a direct response from one of the most influential people in the field of training and development.

First, we begin with Beverley's original posting.

Verbal/non-verbal communication

Would others mind sharing the statistics they use on this topic? I'm particularly looking for percentages on the following areas:

- words spoken
- tone of voice
- non verbal signals.

If you could give sources / references for the percentages or range of percentages you use that would be particularly useful. *Beverley Williams*

There were many responses, some direct to Beverley and others, like the two that follow, were posted to the forum.

Mehrabian is sometimes attributed with the figures 55% non-verbal, 38% tone of voice and 7% words spoken. Other people have come up with different percentages. It is, of course, a misinterpretation of the research to say that 55% of our communication is non-verbal and so on. The experiments have subjects listening to statements read in different tones of voice and with different non-verbal signs, to measure the extent to which the subjects agree with the statements. For example, I'm going to kill you!, could be said in a threatening voice while performing a stabbing movement or a laughing voice with arms akimbo. You're my best friend, could be said with a threatening voice and so on. Subjects were asked the extent to which they believed the communicator in each case. It was found that the non-verbal language carried many more times the weight of the verbals alone. When the verbals and the tones of voice matched but were different from the non-verbals, subjects still believed the non-verbals. Only when all three forms of communication matched would true belief be achieved.

I can let you have more detailed references if you want, but I would recommend reading Michael Argyle's books. *Tim Russell*

I have come across a range of these. I recall that the original Mehrabian stats were 7% or 8% words and the rest non-verbal. Some recent discussions have suggested that whilst the concept is the same, words may be a little more important than that.

After playing around with it, I tend to use the figures 25% words, 35% tone of voice and 40% movement. I ask delegates to compare 'That's a good idea, Fred' spoken in a normal tone with 'That's a good idea, Fred' spoken in a sarcastic tone to demonstrate the point. If the delegates have children, they make a useful case study of how to communicate very effectively without words! Words, music and dance make a good Venn Diagram; then get the delegates to suggest percentages for each. I'm looking forward to other responses. *Mark Briegal*

Spurred on by the response and in search of more information, Beverley then contacted Albert Mehrabian.

I emailed Mehrabian and told him that we were discussing his research and asked him to recommend one of his publications for our purposes. Below is his response (I asked for permission to post it). *Beverley Williams*

Here are a few examples of important aspects of communication described in *Silent Messages*:

1. Inconsistent communications and the relative importance of verbal and non-verbal messages. This work of mine has received considerable attention in the literature. *Silent Messages* contains a detailed discussion of my findings on inconsistent and consistent messages of feelings and attitudes (and the differential importance of verbal versus non-verbal cues) on pages 75 to 80. *Total Liking = 7% Verbal Liking + 38% Vocal Liking + 55% Facial Liking*

Please note that this and other equations regarding differential importance of verbal and non-verbal messages were derived from experiments dealing with communications of feelings and attitudes (that is, like-dislike). Unless a communicator is talking about their feelings or attitudes, these equations are not applicable. Also see references 286 and 305 in *Silent Messages* - these are the original sources of my findings.

2. Persuasion - what are the important non-verbal messages for effective persuasion of others, for example in a supervisory role or in sales?

3. Deceitful behavior - how can one detect that another is being deceitful or not overly forthcoming?

4. Individual communication styles - how do we describe a person's general communication style and what are the basic elements of a person's style? How can one identify problem elements in one's own non-verbal communication and improve one's communication effectiveness? *Albert Mehrabian, PhD.*

What's **New...**

New and recently released training resources.

• CALL CENTRE VIDEOS

New call centre training videos from Fenman

New from Fenman is a series of four videos for call centre training. Each of the four titles in the series lasts approximately 15 minutes and packs in powerful messages conveyed by believable characters. The four titles are:

- *The Really Angry Customer*
- *It's Your Call*
- *The Outbound Call*
- *Attitude is Everything*

The series originates in Australia and each title is, according to Fenman MD Hugh Murray, 'just superb'. A trainer's guide accompanies each title offering full trainer support and ideas on how to make maximum use of the video.

The four videos are available at £395 each or only £875 for the series (plus carriage and VAT). A complete description of each video can be found on Fenman's website at www.fenman.co.uk

To arrange a free preview call 01353 665533 or email service@fenman.co.uk

• NLP WEBSITE

Website promotes benefits of NLP

Excel Communications claims its new web site will offer more than your average site. In its first phase it will promote the benefits of NLP (neuro-linguistic programming) in business – and, as director Sue Harley says, 'NLP is the most exciting and successful area available to significantly achieve outstanding performance change with individuals, teams and organisations'.

www.excelcom.co.uk aims to provide a forum for business people with an interest in performance management, to exchange views and information, as well as offering a background to Excel Communications and its business performance solutions.

Visitors to the new site will, however, come across an introduction to something a bit more unusual – web-based learning as part of training and development programmes.

For further information contact Helen Harding at (tel) 01628 488854 or (email) helen@excelcom.co.uk

• PERSONAL DEVELOPMENT

Personal development for front line workers

The Improvement and Development Agency for Local Government (IdeA), together with the West Midlands Local Government Association (WMLGA) has launched a new training pack to support personal development for frontline workers.

The training pack follows a highly successful training programme that has been developed over the last two years by the WMLGA. The programme was developed as a very practical way of supporting local authorities in providing timely and cost-effective training and development for front-line staff, a specific group of employees who traditionally have had less opportunity to reap the benefits of high quality training.

The main aim in launching this pack is to extend this valuable, in some cases life changing, programme to as many people as possible. The programme has been designed to focus on real organisational and personal development issues, resulting from consultation with both officers and front-line workers themselves. Its format is designed to address and overcome concerns regarding the many barriers that prevent access to training for this group of employees, including the release of staff from the workplace, lack of resources to support staff, lack of opportunity, as well as individuals' own misconceptions about training.

This £70 training pack is available from IDeA Publications at (tel) 0171 296 6600 or (fax) 0171 296 6523.

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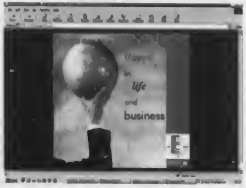

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This £70 training pack is available from IDeA Publications at (tel) 0171 296 6600 or (fax) 0171 296 6523.

Choose any 3 packs to assess free for 10 days

Call 01353 665533

Quality Calls

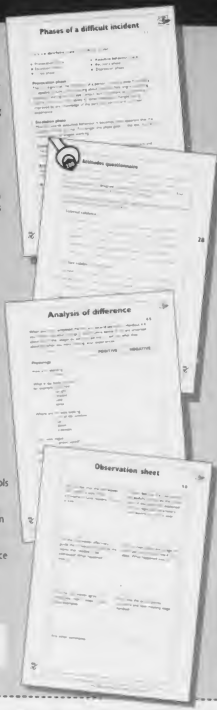
These 15 activities are ideal for training your telesales or call centre teams. Participants practise thinking through what they want to get from their calls, how to analyse their own approach to customers on the phone, and how to prepare themselves mentally to be totally positive. You'll show them how to pick up on caller clues and how to interpret customer responses quickly and accurately.
Author: Michele Barca. £195 + p&p.

Essentials of Management

Now when you need some inspiration for your management development programme here are 20 training activities, ready to run. All the key subjects like decision making, leadership, motivation and performance management are covered, fully and clearly. With this pack at your fingertips, you have your management development training all organised.
Author: Eddie Davies. £195 + p&p.

The Evaluation Toolkit

Here are over 70 practical tools to help you measure the effectiveness of your training. This unique toolkit is based on the four-stage model of assessing reactions, assessing learning, assessing performance and assessing value. See for yourself how it can help you develop your skills in this vitally important area.
Author: David Simmonds. £195 + p&p.



Setting Objectives and Seeing Them Through

This pack has activities for every aspect of objective setting: from understanding what objectives are - and why they should be SMART - through to developing objectives for teams and departments, as well as individuals. Participants learn how to devise and monitor objectives that are (and remain) current, relevant and focused - and therefore much more likely to be seen through to completion.
Author: Beverley Williams. £195 + p&p.

Time to be Effective

This unique collection of 19 activities enables you to explore why people haven't used time management techniques in the past - and how to find new practical approaches that really work for your participants. Everyone will be impressed with the improvement in productivity. And your time management training will be more relevant, more practical and more effective than ever before.
Author: Christine Chun. £195 + p&p.

Dealing with Difficult and Aggressive Behaviour

Here are 19 powerful new activities to help people defuse anger, resolve conflict, stop abuse and manage aggression - from members of the public or colleagues. Give your people the skills they need to handle anything their job throws at them - confidently, professionally and calmly.
Author: Caroline Love. £195 + p&p

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- ❑ **Quality Calls**
- ❑ **Essentials of Management**
- ❑ **The Evaluation Toolkit**
- ❑ **Setting Objectives and Seeing Them Through**
- ❑ **Time to be Effective**
- ❑ **Dealing with Difficult and Aggressive Behaviour**

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TJ/8/99

• HEALTH & SAFETY

Health and safety games for trainers

Health and Safety Games for Trainers by Graham Roberts-Phelps, is a new collection of nearly 100 games, quizzes and exercises from Gower Publishing. The manual covers every aspect of health and safety at work, including: safety awareness; managing safely; office safety; first aid; display screen equipment; risk assessment; environmental awareness; safe manual handling; fire safety; personal protective equipment; and hazardous substances.

The exercises are easy and simple to run, which means you can slip them into safety team meetings, or use them to help change the pace, or introduce or close a subject during a longer session. They focus on generic skills and knowledge, and are consequently ready to use or easily adapted to the specifics of your own organisation. And all of them have been devised, developed and tested by the author during safety skills training courses.

Health and Safety Games for Trainers provides anyone involved in safety training with a compendium of ideas and material that will save them considerable time, increase the impact of their session and get their delegates active and involved.

To order direct contact Bookpoint Ltd at (tel) 01235 827730 or (fax) 01235 400454.

• EQUIPMENT

Sanyo launches XGA ultra portable LCD projector

Sanyo, the UK's leading LCD projector brand, has launched a new ultra portable model, the PLCXU10. A4 in size and weighing just 3.3 kg, the PLCXU10 is one of the lightest projectors on the market, and featuring 800 ANSI lumens it is also one of the brightest ultra portable projectors available.

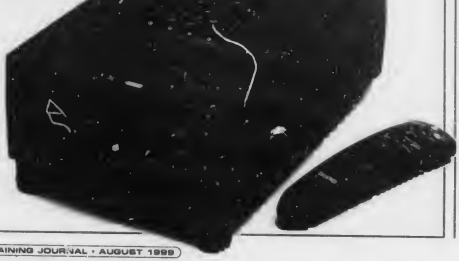
Stacked with features, the PLCXU10 features a PCMCIA card slot enabling presentation data from a PC to be downloaded onto a SmartMedia card. This is simply inserted into the side of the projector, thus eliminating the need to connect to a PC or a laptop computer.

Incorporating 1,024 x 768 pixels, this new super compact LCD projector offers true XGA resolution and incorporates Sanyo's Digital Realize Interpolation Technology (DRIT) to expand SVGA signals and compress SXGA.

With a screen size of .75 metres to 7.5 metres, the PLCXU10 has a throw distance of between 1.1 metres and 14.1 metres, and has a motor driven zoom focus of 1:1.3.

Measuring 215 x 109 x 326 mm (w x h x d), this latest Sanyo LCD projector is PAL/SECAM/NTSC/NTSC4.43 compatible, and is housed in a magnesium alloy cabinet for lightweight durability.

Further information at (tel) 01923 477221.



• BOOKS

The International Simulation & Gaming Research Yearbook Volume 7

The *International Simulation and Gaming Yearbook* brings together topical and authoritative contributions from leading figures in the field of gaming and simulations.

Published by Kogan Page and subtitled *Simulations and Games for Strategy and Policy Planning*, the yearbook is the latest collection of papers from the Society for Interactive Learning. It brings together cutting edge material from around the world in this very topical key area of interest for business management, training and education.

The individual papers cover the development, use and evaluation of games and simulations that are designed to aid strategy development and policy making. Representing current international thinking, research and best practice, this new edition of the yearbook contains a series of contributions by authors drawn from a wide range of countries including Australia, France, the UK and USA.

The book is aimed at anyone wishing to harness the power of this increasingly popular management technique. *For more information contact Nick Mortimer at (tel) 0171 278 0433 or (email) nmortimer@kogan-page.co.uk*

VIDEO •

Working with Care:

a new film by Leeds Animation Workshop, narrated by Alan Bennett

Princess Ella and Prince Charming lived happily ever after, as everybody knows. But then they had children, and life became more complicated, as they both juggled the job of castle management with responsibility for the royal toddlers. Ella's fairy godmothers were finding it difficult to help: they were all over 500 years old now, and did not get out as much as they used to. Besides, one of them was becoming very forgetful ...

With its fairy story characters, and the familiar voice of Alan Bennett on the soundtrack, this new 15-minute animated video appears at first simply to be a light-hearted traditional treat. But the problems it deals with are very real, and all too serious for many working parents and carers.

The video's producers, Leeds Animation Workshop, are a team of five women whose films have won international recognition over the past 20 years. This production was commissioned by the European Equality Programme, the Equal Opportunities Commission, Leeds Council, the Leeds TEC, Tyneside TEC, and UNISON.

Employment Minister, Margaret Hogde, who has written a foreword to the booklet that accompanies it, has welcomed the film. 'More and more employers are starting to realise that there is a business case for introducing flexible, family-friendly employment practices,' says Ms Hodge, the Parliamentary Under Secretary of State for Employment and Equal Opportunities. She adds: 'Leeds Animation Workshop's latest production is a timely contribution to this important debate'.

Short, colourful and entertaining, the film is suitable for broadcast and for training or educational purposes. 'We hope it will raise awareness and spark off new ideas about how we combine work, life and caring responsibilities, particularly bearing in mind the needs of working parents, working carers, and those they care for,' said Terry Wragg of Leeds Animation Workshop.

The video can be brought or hired by educational organisations, local authorities, carers' and parents' organisations, unions, employers, and organisers of courses and conferences about equal opportunities or good employment practice.

Available from Leeds Animation Workshop at (tel) 0113 248 4997 or (website) www.leedsanimation.demon.co.uk. Hire/preview £10 (refundable if sold), sale price £40, incl. VAT, p&p and booklet.

MANAGEMENT •

New management books

Management Books 2000 has released two new publications: *Success with Psychometric Testing* and *Organise with Chaos*.

Success with Psychometric Testing is in its sixth reprint, and focuses on the process and outcome of testing as well as understanding the mysterious classification words Drivers, Amiables, Intuitives, and so on. Identifying psychometric types can ensure all the square pegs go into the square holes and the composition of a team can be finely balanced to achieve the greatest efficiency. Author, Derrick White claims that psychometric testing is invaluable in understanding all relationships including selling, negotiation and team building. He is a training consultant, psychometrician, freelance writer, Rotary speaker and the SNP's parliamentary candidate for Edinburgh East.

Organise with Chaos explores the foundations of current management theory and practice. The authors, Robin Rowley and Joseph Roevens, argue that most of our current assumptions about vision, motivation, leadership, revolution and rewards are either only half right or are totally obsolete for dealing effectively with today's global business conditions. The book helps to create a new standard of 'change efficiency' and replaces the complexity of conventional wisdom with a more simple, natural way to transform any business or organisation.

For further information contact Management Books 2000 Ltd at (tel) 01285 760722.

VIDEO •

New video on workplace risk assessment from FPA

Amendments to the Fire Precautions (Workplace) Regulations 1997 are currently going through Parliament and when they are brought into effect, the Regulations will have an impact on many more businesses than previously.

In order to provide support to employers, the Fire Protection Association (FPA) has produced a video entitled *Workplace Fire Risk Assessment , A Guide for Employers*. This video gives guidance to employers who need to comply with the Fire Precautions (Workplace) Regulations.

The video opens in a casino setting to illustrate the point that those not complying with the Regulations are taking a risk. Andrew Kazamia, star of the TV show *London's Burning*, then takes viewers through the process of a fire risk assessment, showing scenes of potential risk that every office worker will recognise.

The video serves as an introduction to fire risk assessment methods and can be helpful to those with no previous fire safety knowledge. The content covers the five key actions to be taken: identify risks by inspecting the premises; analyse findings; eliminate hazards as far as possible; minimise hazards that cannot be eliminated; and manage the residual risk.

Also available is the book *Fire Risk Management in the Workplace*, which is intended as a guide for employers and managers responsible for fire safety in business premises, including individual branches of large companies.

The FPA is running a special offer on these publications. If a copy of the video is ordered before 30 September 1999, a copy of the book will be sent with the video free of charge. Workplace Fire Risk Assessment *has a running time of 15 minutes and is available for £49.50 plus VAT (15 per cent discount to FPA members) from the FPA Publications at (tel) 0181 207 2345 or at (fax) 0181 236 9701. The book* Fire Risk Management in the Workplace *is available separately for £9.50.*

Andrew Mayo is a consultant, speaker, writer and facilitator in international HR management, with specialisms in people and organisation development
He may be contacted at (tel) on 01727 843424 or (email) at andrew@mlitd.com

Proving the benefits

Evaluation is all the rage, says **Andrew Mayo**. But why is it so difficult? The solution may be to start with a clear definition of what the achievement should be.

These days, you can fill a conference with subjects such as 'Relating your training to the bottom line' and 'Evaluating investment in training'. Since we like to think of training as an investment rather than a cost, so we feel we should demonstrate a return. However, most find it a very difficult thing to do, and this month we might ponder why that might be so.

Donald Kirkpatrick, now in his 70s, has re-emerged as a popular speaker. He wrote a PhD thesis on evaluation in 1959 and identified four levels of evaluation for training. Readers will not need me to repeat them in any detail. Time and again, though, one hears people say: 'To be honest, we have not got very far beyond Level 1.'

Kirkpatrick would say this 'happy sheet' level is very important in measuring the quality of the experience and its delivery, and I would agree. All trainers need to get feedback both on their style and content, and on the design of an event. Positive experiences send delegates away with a positive frame of mind, telling others how good the event was. But this does not in any way measure whether any learning took place – and it is only learning that will make any difference to the individual or the organisation.

Good figures reinforce the belief of those concerned in delivering an event that they are doing a good job. But they do not say whether they were doing the right things.

Level 4 – the lasting business change – is notoriously difficult to evaluate and that is largely due to the other factors that influence it other than training input. But what about the intermediary levels? I would suggest that there is a fundamental flaw in Kirkpatrick's approach in that he starts with the training, then looks for the benefits that result.

If our portfolio is built on the act of faith philosophy of training (often shared by many senior managers) that the more training we do the more beneficial it will be to our organisation, then we are always going to struggle. As a result, literally millions of pounds are spent to produce no other benefits than a rest from the workplace, an interesting experience, or some heightened self-awareness. (At the same time we may be saying we only undertake training that has a business benefit ...)

Since we like to think of training as an investment rather than a cost, so we feel we should demonstrate a return

The place to start

The right place to start is in defining clearly what we are trying to achieve in the first place.

Many years ago, Robert Mager introduced us to terminal objectives, and many courses are written in this vein. Good terminal objectives can be tested if we want to know whether learning was achieved. But how often do you do that? If the learning was knowledge related, it can be tested at the end of the course. Skills must be tested in the workplace. Learning related to competency improvement should also be tested in the workplace, after a period of time.

If we are doing teambuilding, do we have some precise indicators of improved effectiveness to test afterwards? Better still, do we have a quantitative productivity objective that should be the real outcome?

Increasing capability is what learning is about, but with a view to what? Sometimes it is an end in itself – for personal development, for example – but too often we lack a broader goal, which is to influence a business measure. We have to go right back to our analysis of what is needed and our prioritisation of it.

If we asked the question 'What is the needed learning, and for whom, that will support the goals of this business/department/team?' then we would have a firmer anchor into the business benefit – and we would cease to struggle with proving benefits. We relate what is achieved to what we set out to achieve. We evaluate only at the level of the goals of the intervention.

So for this year's training 'investment', at which of Kirkpatrick's levels is each programme aimed – explicitly and specifically? The percentage in Levels 3 and 4 may be an indicator of whether you can expect to measure a 'return' on investment.

Date & Venue	Event	Contact
4-5 September Watford	Official Transactional Analysis Training Course	AD International Tel: 01923 224737
7 September Watford	FREE NLP Open Evening	AD International Te: 01923 224737
9 September Derby	High-Impact Communication Skills for Women	CareerTrack Tel: 0800 89 4178 (ring for other venues and dates)
28 September	**Sales Training – latest developments**	**Sales Training Association, 17 Playses Green Hambridge, Langport, Somerset TA10 0AP Tel/Fax: 01460 281600**
29 September West Sussex	A Practical Approach to Implementing Trans-Cultural Value	Roffey Park Tel: 01293 851644
6-7 October NEC, Birmingham	WOLCE '99	Venture Marketing Group Tel: 0208 394 5171
7-8 October Watford	TA & NLP Masterclass	AD International Tel: 01923 224737
12-14 October Stratford-upon-Avon	**Developing Consultancy Skills**	**Development Resources Ltd 11 Southbourne Court Drury Lane, Dore, Sheffield S17 3GG Tel: 0114 262 0428; Fax: 0114 236 5396 Email: devres@globalnet.co.uk**
25-28 October London	The 4th International Competency Conference	Linkage International Ltd Tel: 0181 977 9277
27-29 October London	IPD National Conference & Exhibition	Peter Mirrington Exhibitions Tel: 01284 850011
25 November London	**'The Fusion Experience' – bringing accelerated learning to life in your business. A one-day conference**	**Kaizen Training Ltd, "The Stables", Mansion House Farm, Bedmond Road, Abbots Langley, Herts, WD5 0QB Tel: 01923 262278; Fax 01923 269680; Email:partners@stables.datanet.co.uk Website www.kaizen-training.co.uk**

Diary Dates

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